



ETC Monitoring Sentiment For Domestic and Intra-European Travel

Respondents that plan to travel to Portugal next

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This report monitors sentiment and short-term intentions for domestic and intra-regional travel within Europe and is the **20th wave of market research** initiated in September 2020. Responses were collected from Europeans in 10 high-volume source markets in light of the COVID-19 crisis that answered they were planning to travel to **Portugal** next.

RESEARCH HIGHLIGHTS:

- **73% of surveyed Europeans planning to travel in the next 6 months**, representing a 6% increase compared to a year ago. **78% of Europeans between the ages of 35-44 are the most eager to take a trip over the next six months.**

- The main concerns for Europeans when choosing a travel destination is the **destination safety** (18%) follow by the **weather stability** (12%) and **attractive bargaing or deals** (12%)

- **61,4 % of Europeans intending to travel will visit another European country,**

- Europeans most desired leisure for the autumn/winter are **Culture & Heritage** (18%), **City Break** (17%) and **Sun & Beach** (14%)

- **The majority of Europeans prefer to fly to their next destination (53%),** while greener alternatives like train or bus are preferred by 17%.

- **56% of travellers plan to make multiple trips in the next six months** with younger europeans aged 18-24 the most inclined to take multiple trips, with 60% planning to do so.

- **48% of Europeans have not yet booked their next trip,** with people over the age of 55 and city breaks enthusiasts the lest decisive with 61% and 57% respectively, yet to book.

- **Travel websites** (21%), **search engines** (21%) and **online maps** (15%) are the main digital resources used to plan a trip.

- **79% of Europeans adapt their travel behaviour to the climate crisis.** The most frequent habit is reviewing weather forecasts before finalizing the travel plans.

- With financial worries persisting, Europeans are trying to limit costs at the destinations.

***Early-bird travellers** refers to survey respondents that are most likely to travel in the next 6 months/ have short term travel plans

METHODOLOGICAL NOTES



Online market research. Survey participants are consumers with at least 2 overnight trips during the last three years (2021-2023).

Distribution/ data collection period:

Wave	Survey Date	Sample
Wave 17	Set '23 survey	5993
Wave 18	Apr '24 survey	5859
Wave 19	Jun '24 survey	5955
Wave 20	Set '24 survey	6001

The present report is about data (wave 15 to wave 19) from above respondents that selected **Portugal** in the question **'To which country(ies) do you plan to travel next?'**

Respondents' countries (ten high-volume European source markets):

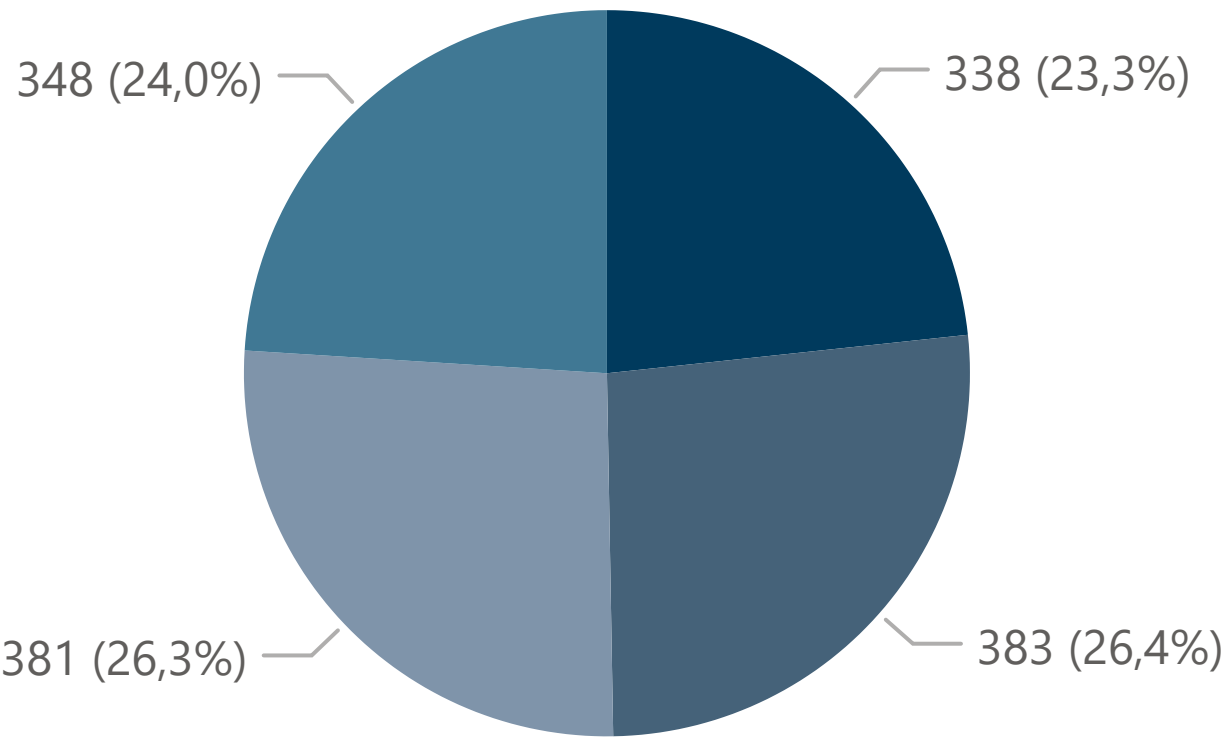
Germany, United Kingdom, France, Netherlands, Italy, Belgium, Switzerland, Spain, Poland and Austria

Research themes examined: Travel personas (1 question), Travel concerns and external shocks on travel (8 questions) and Travel intentions, preferences and trip planning (13 questions)

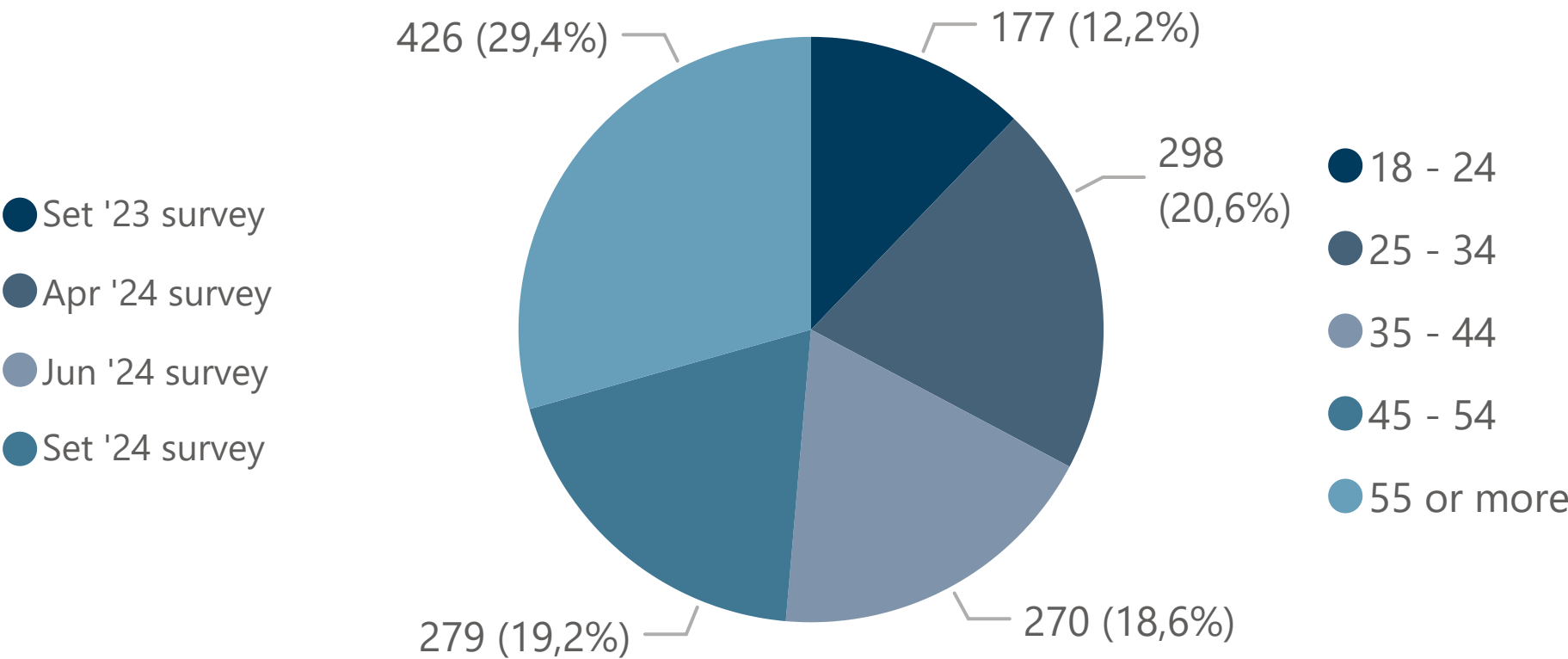


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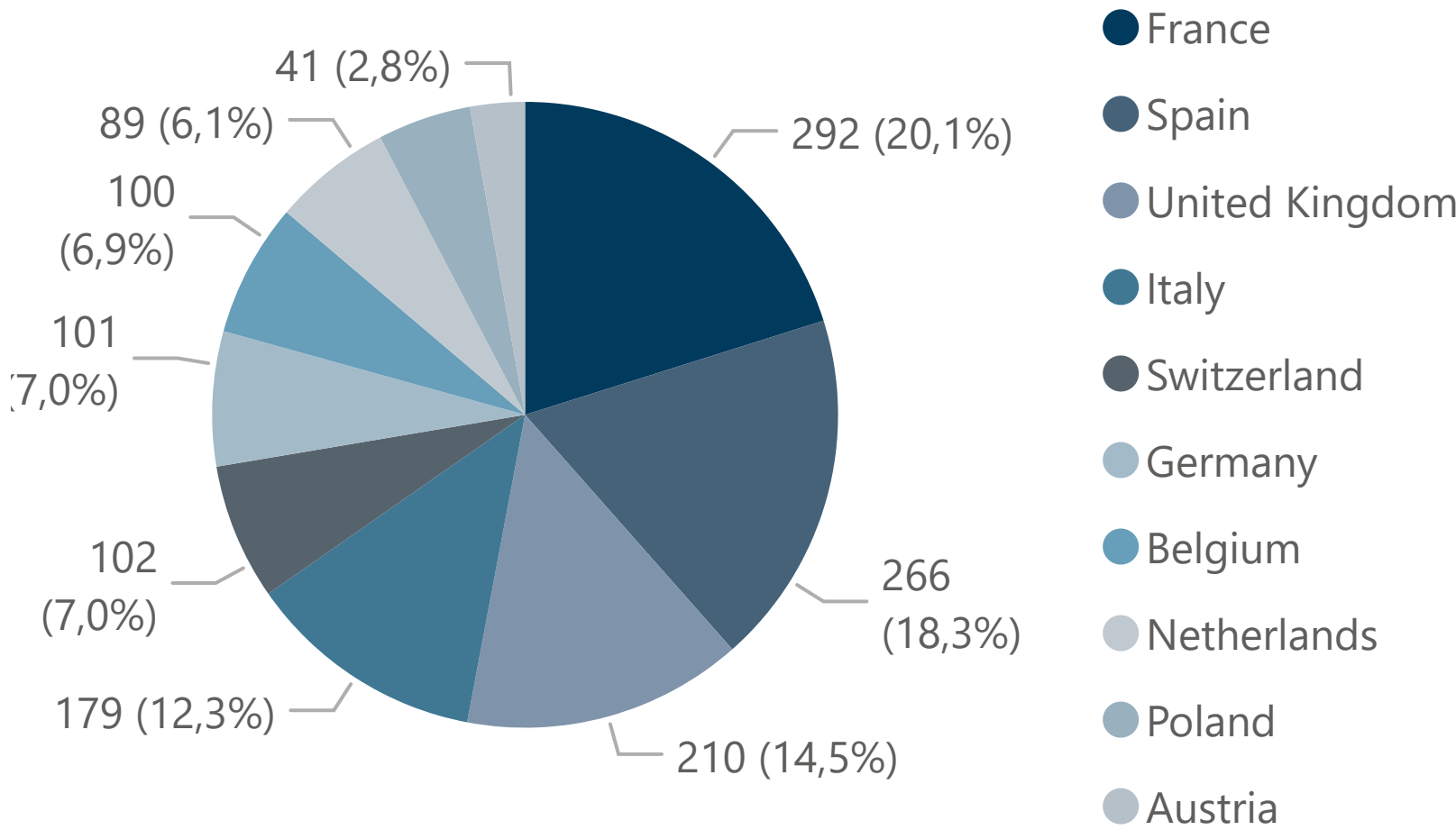
No. and % of respondents, by wave



No. and % of respondents, by age group



No. and % of respondents, by country

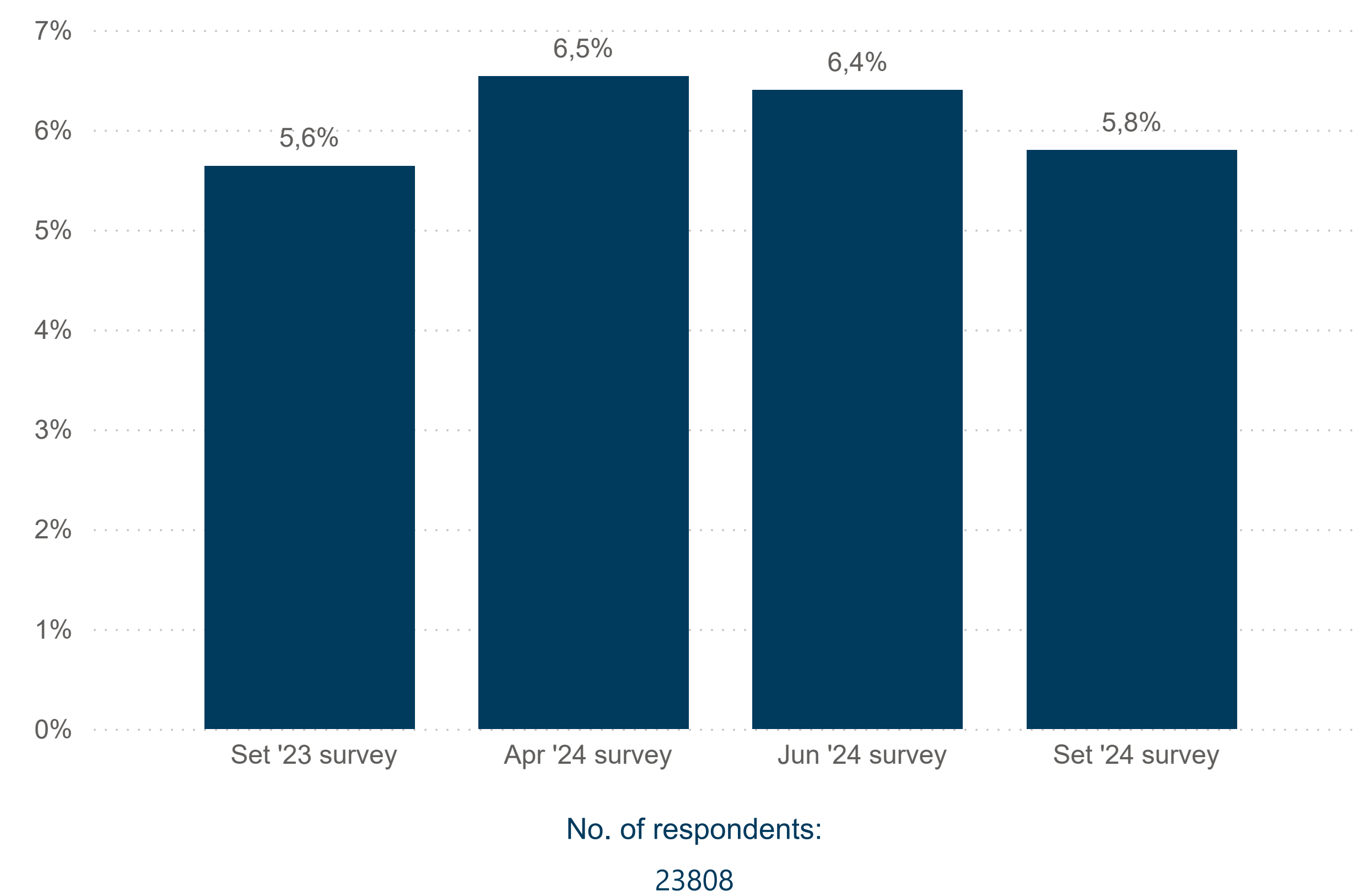


01 TRAVEL INTENTIONS

ETC Monitoring Sentiment For Domestic and Intra-European Travel

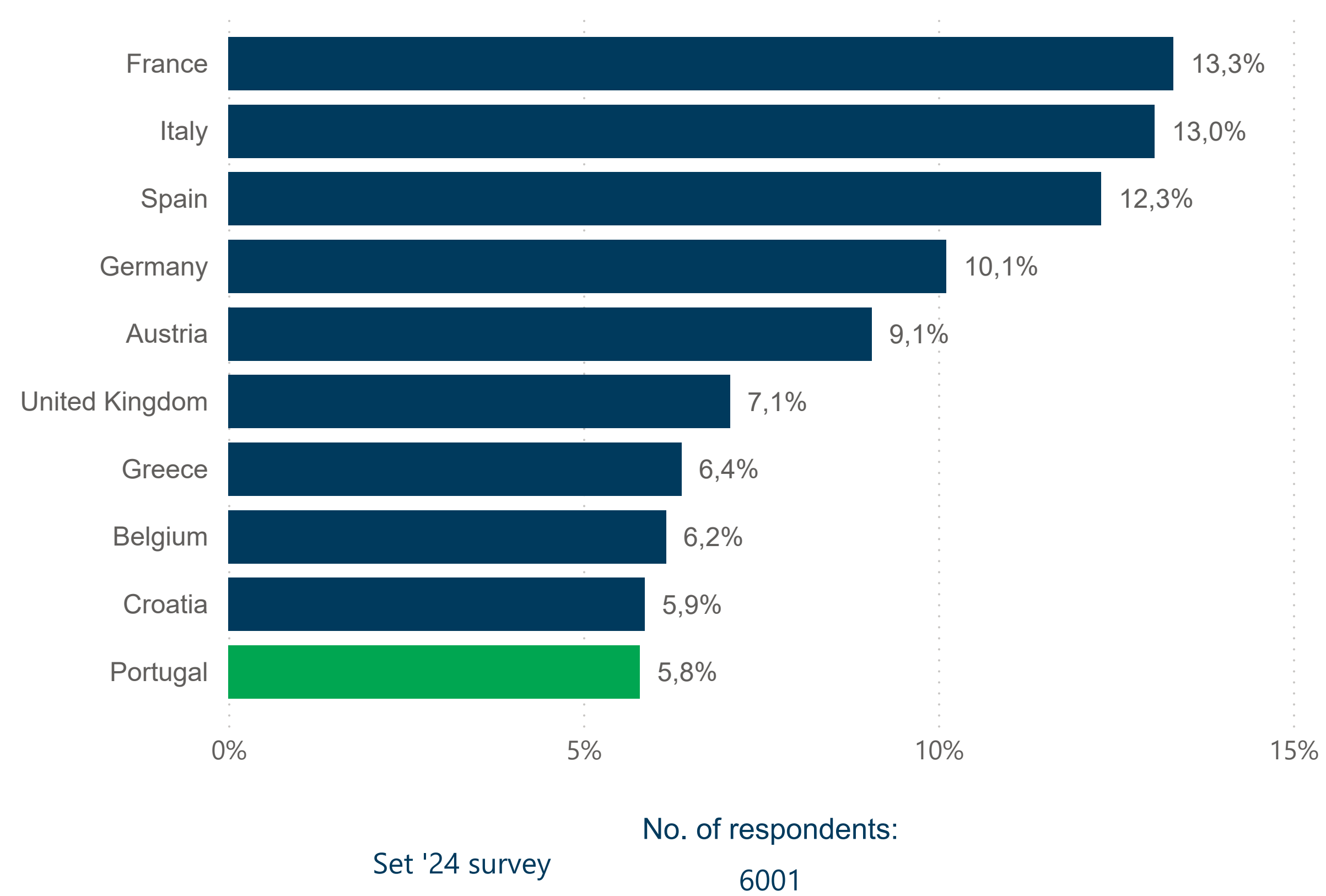
Respondents that plan to travel to Portugal next

Intention to travel to Portugal next



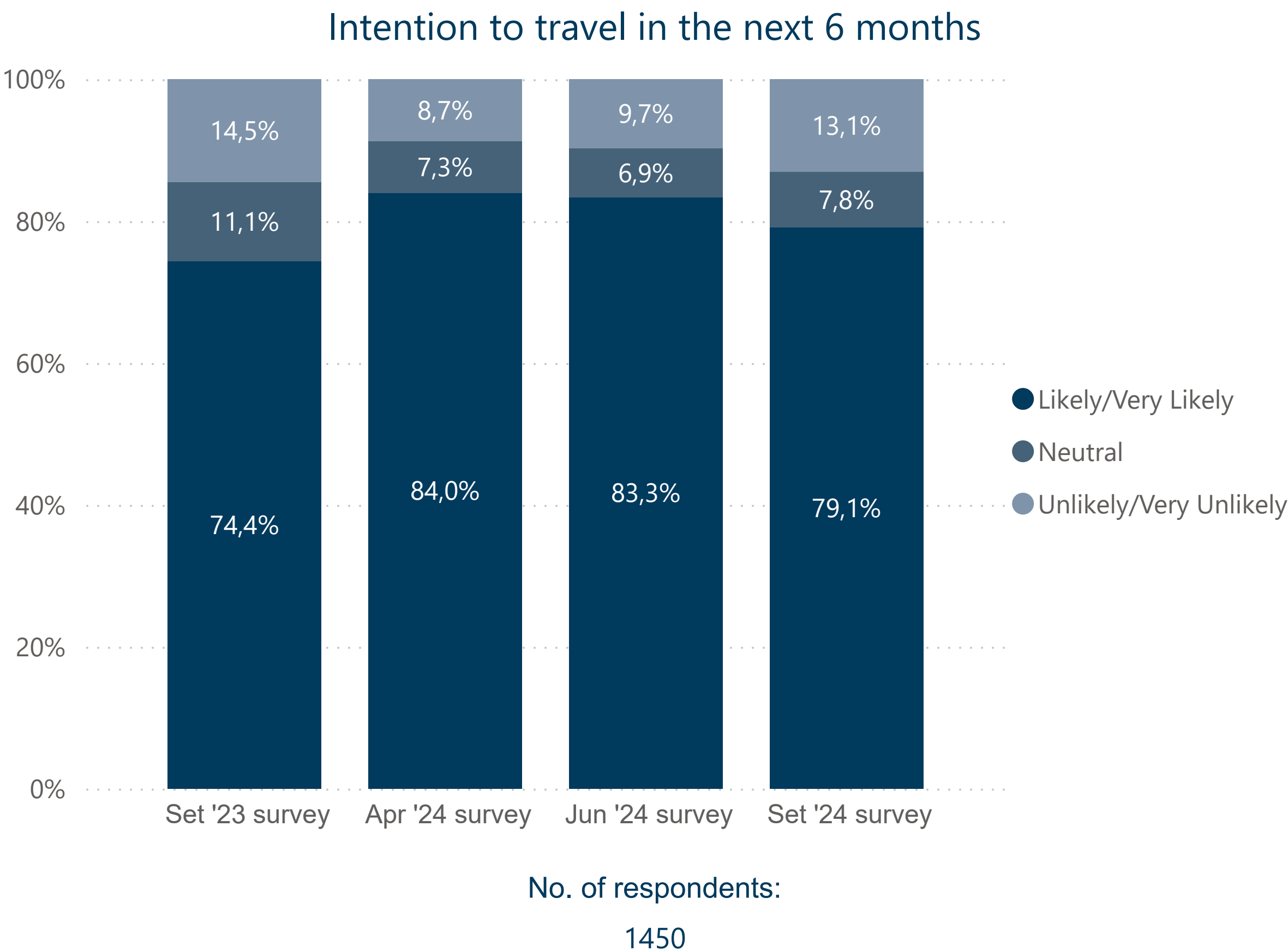
Of all the inquired Europeans, around 5,8% plan to travel to Portugal in the coming 6 months, a small increase compared to the wave from last year.

Top 10 of intended countries to travel to next

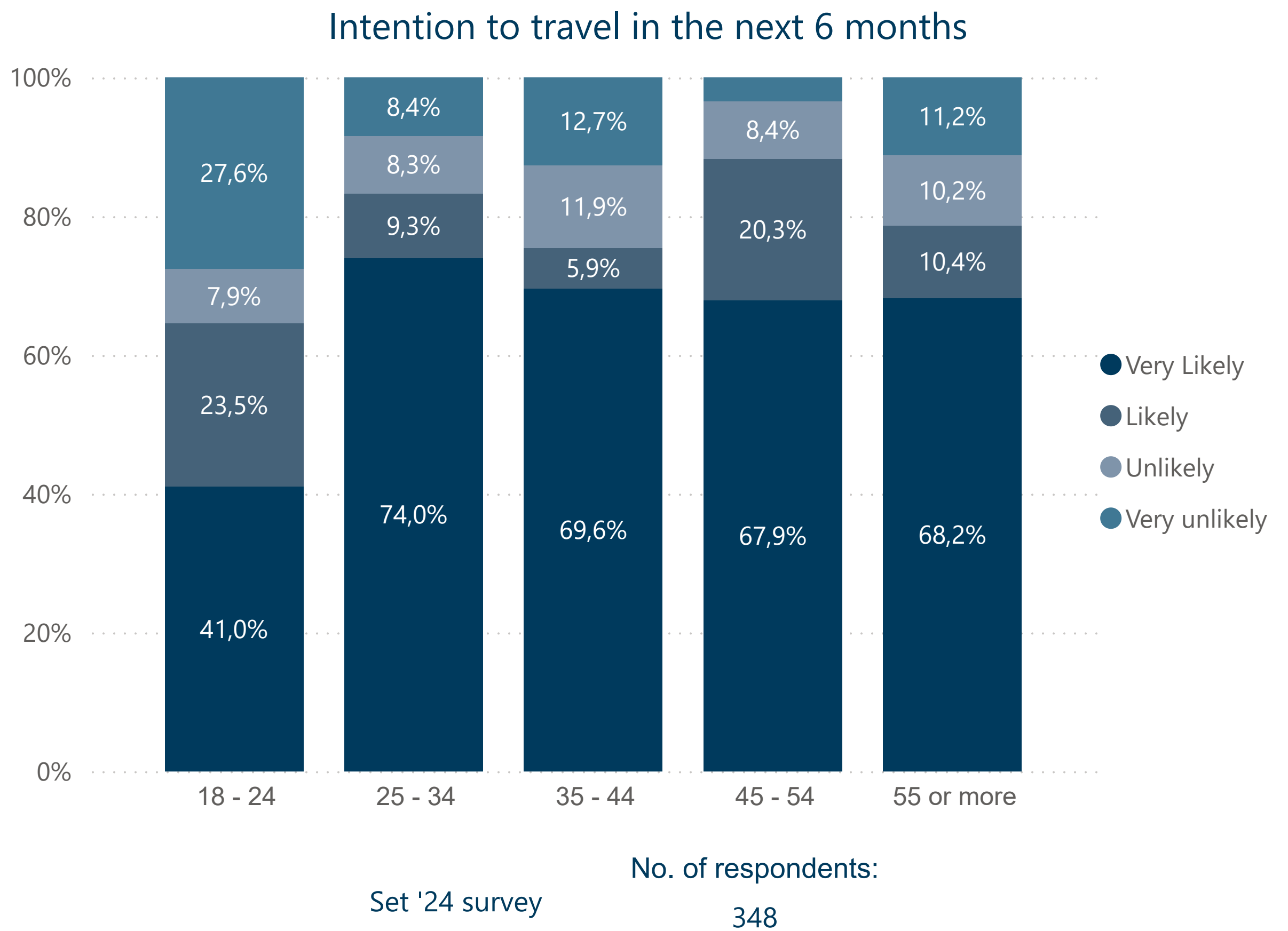


In the most recent wave, Portugal stands as the 10th preferred destination for Europeans, inside Europe.

Question: To which country(ies) do you plan to travel next?



79,1% of Europeans that plan to travel to Portugal, plan doing so in the coming 6 months, an increase of 4,7p.p vs. last year wave.



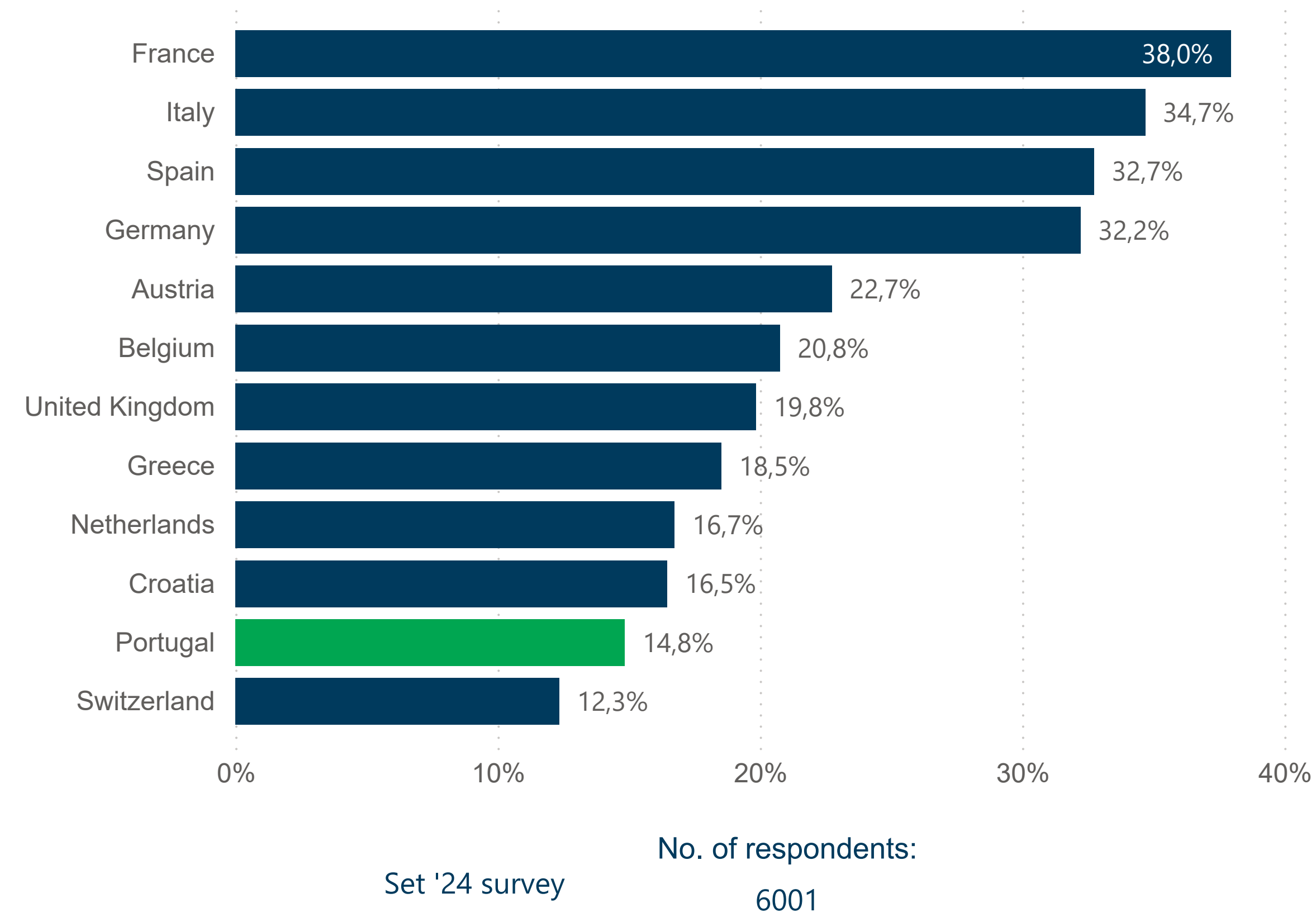
Intention to travel to Portugal in the next 6 months is very likely among the travellers in the age group of 25-34 than among the others, with than 74%.

On the opposite end of the scale, travellers on the age group of 18-24 are the most unlikely of traveling in the next 6 months with almost 35,5% of unlikely or very unlikely answers.

Question: Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

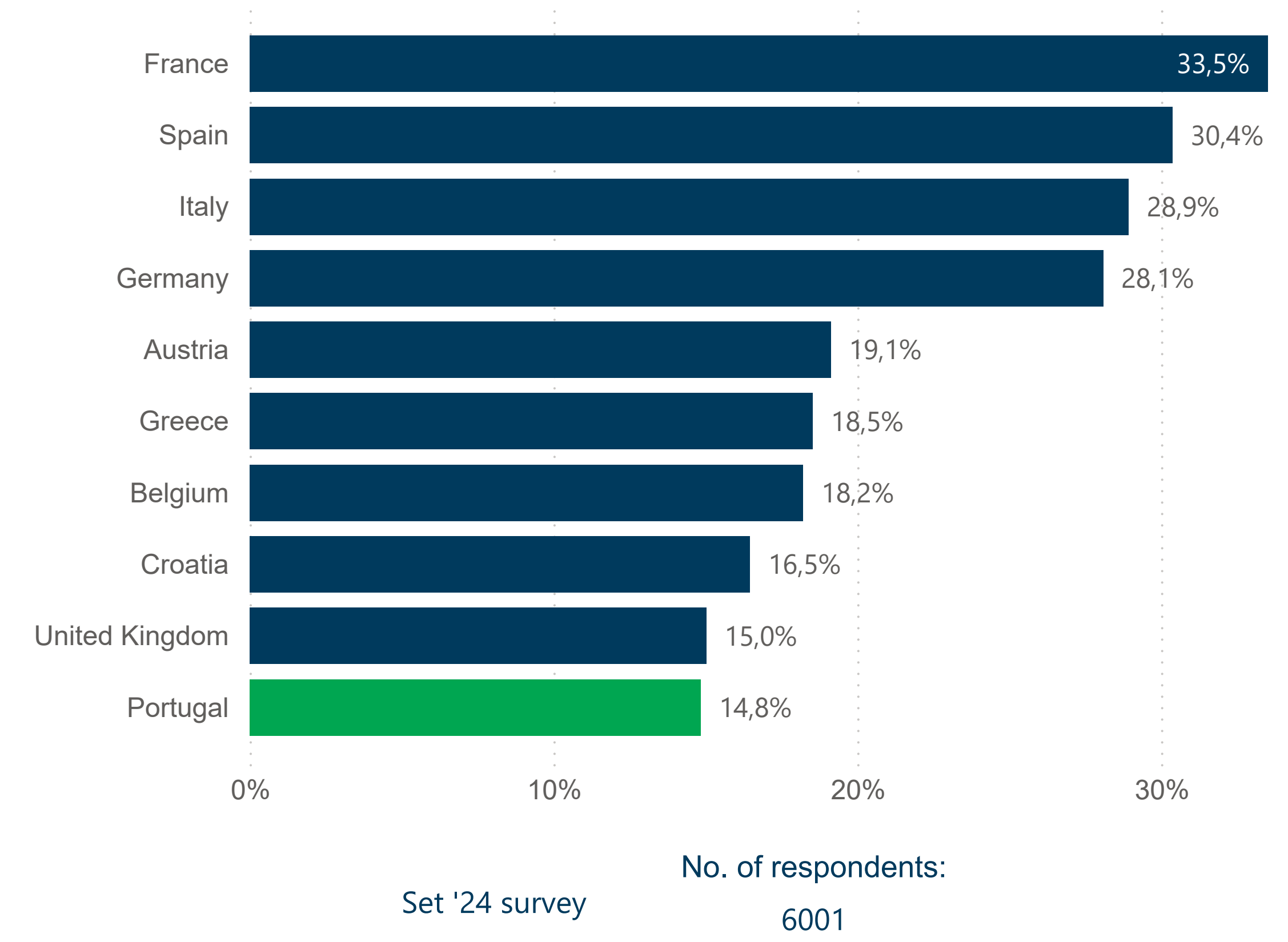


Top 12 countries visited in the past 3 years



In the past 3 years, 14,8% of European travellers have visited Portugal, making it the 11th preferred travel destination.

Top 10 countries visited in the past 3 years (only external travels)

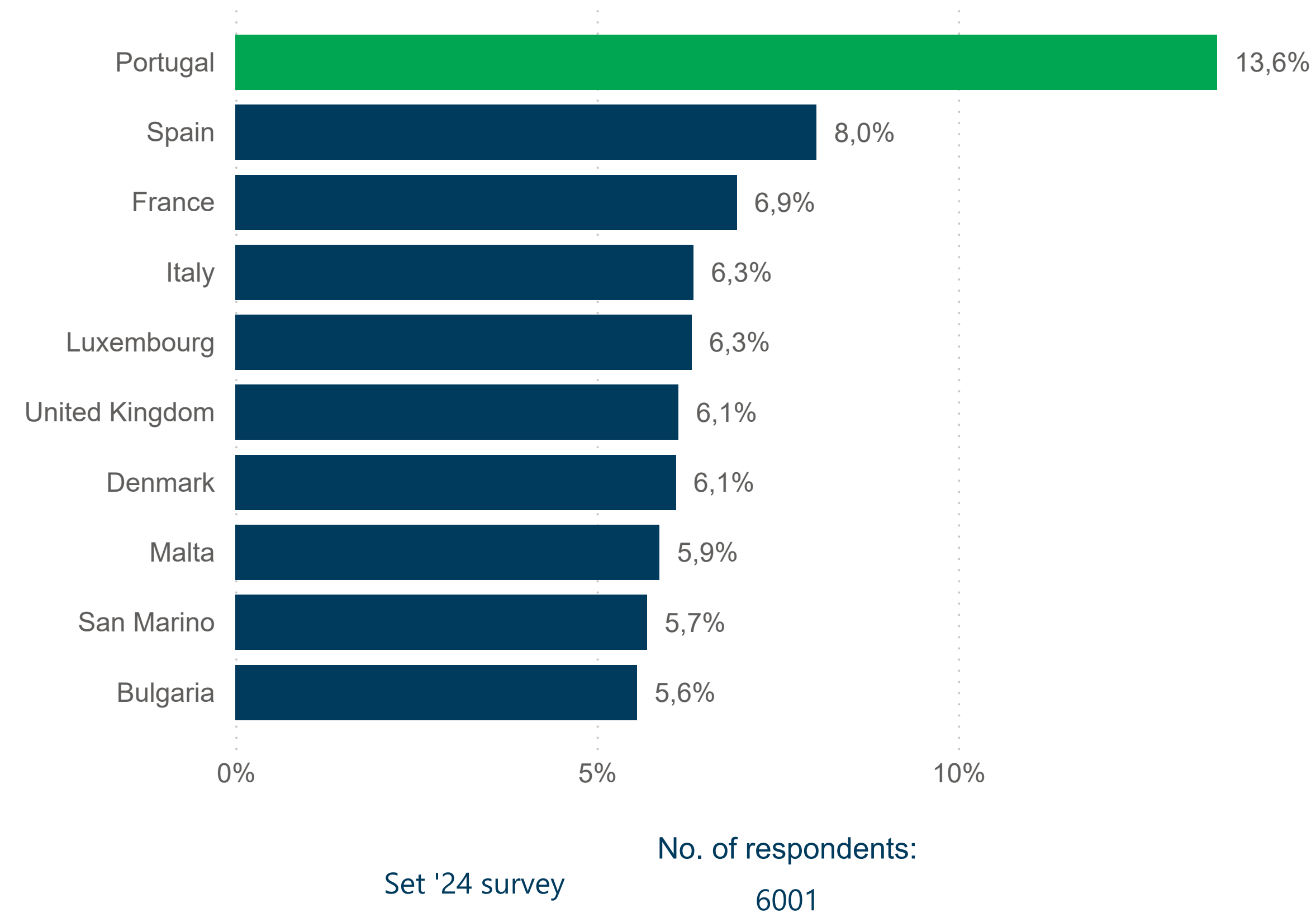


If domestic travel is removed than Portugal becomes the 10th preferred travel destination in the last 3 years.

Question: Which European countries have you visited in the past 3 years?

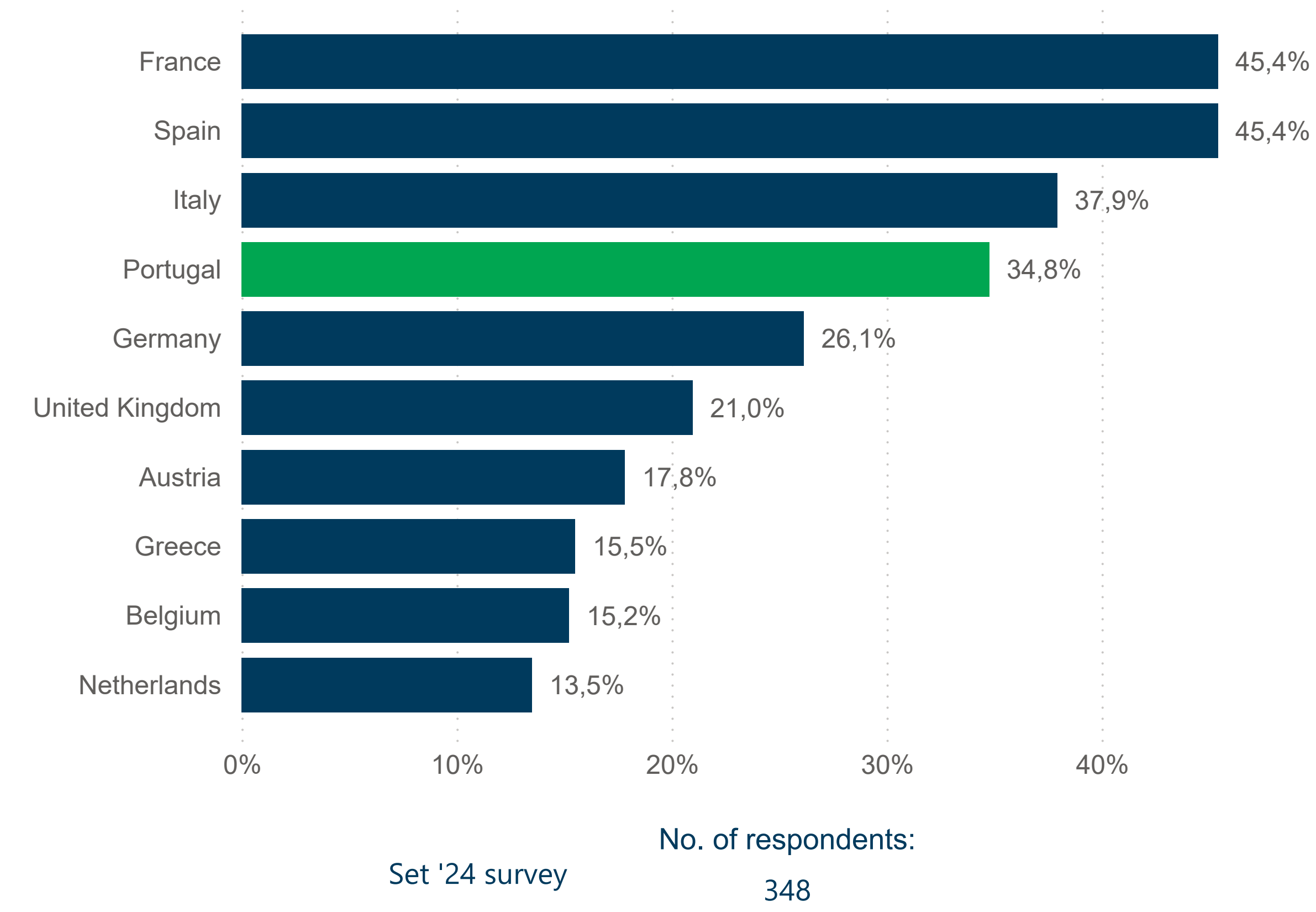


Percentage of those who visited to an european country than plan to visit Portugal



13,6% of Europeans that travelled to Portugal in the past 3 years plan to comeback in the near future. It's also noteworthy that 8% of Europeans that visited Spain recently plans to visit Portugal in the next 6 months.

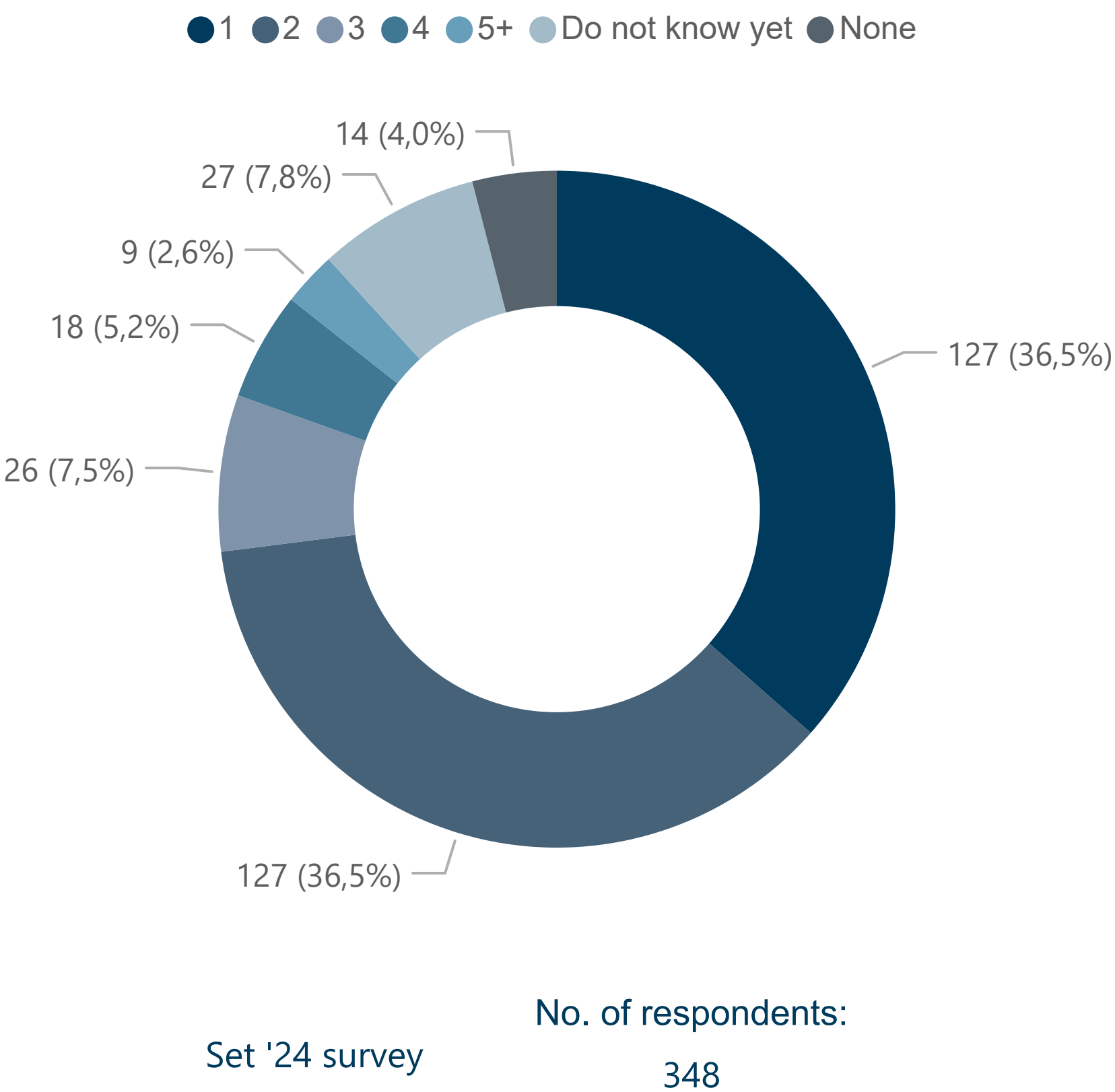
Previous travels of those that plan to visit Portugal in the future



Of those that answered that planned to visit Portugal in the next 6 months, 45,4% have travelled to France recently. Other recent travels include Spain (45,4%) and Italy (38%). Also 34,8% have visited the country in the past 3 years.

Question: Which European countries have you visited in the past 3 years?

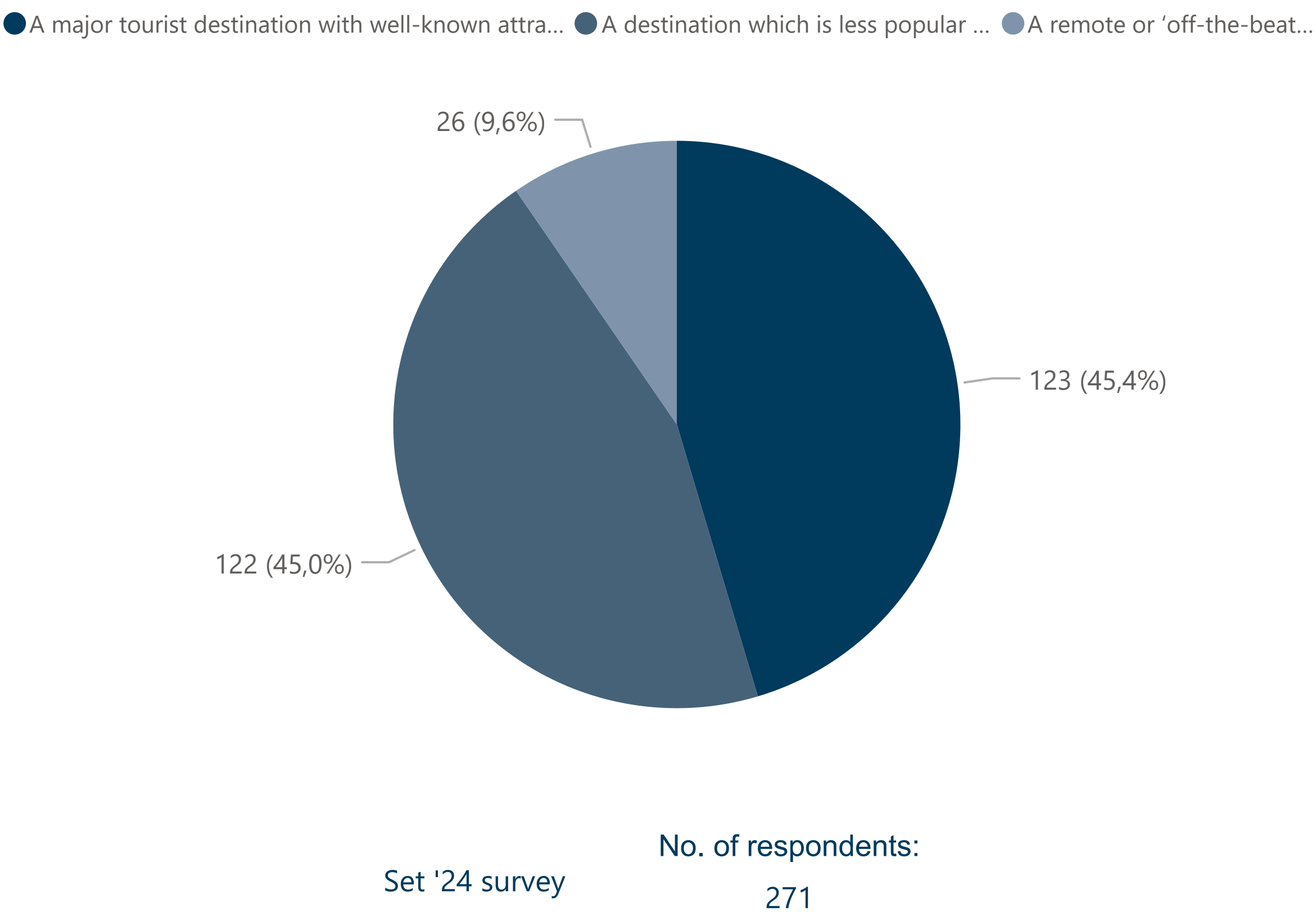
How many trips travellers plan to take in the next 6 months



73% of the respondents intend to travel one or two times in the next 6 months.

Question: How many trips do you plan to take in the next 6 months, within Europe?

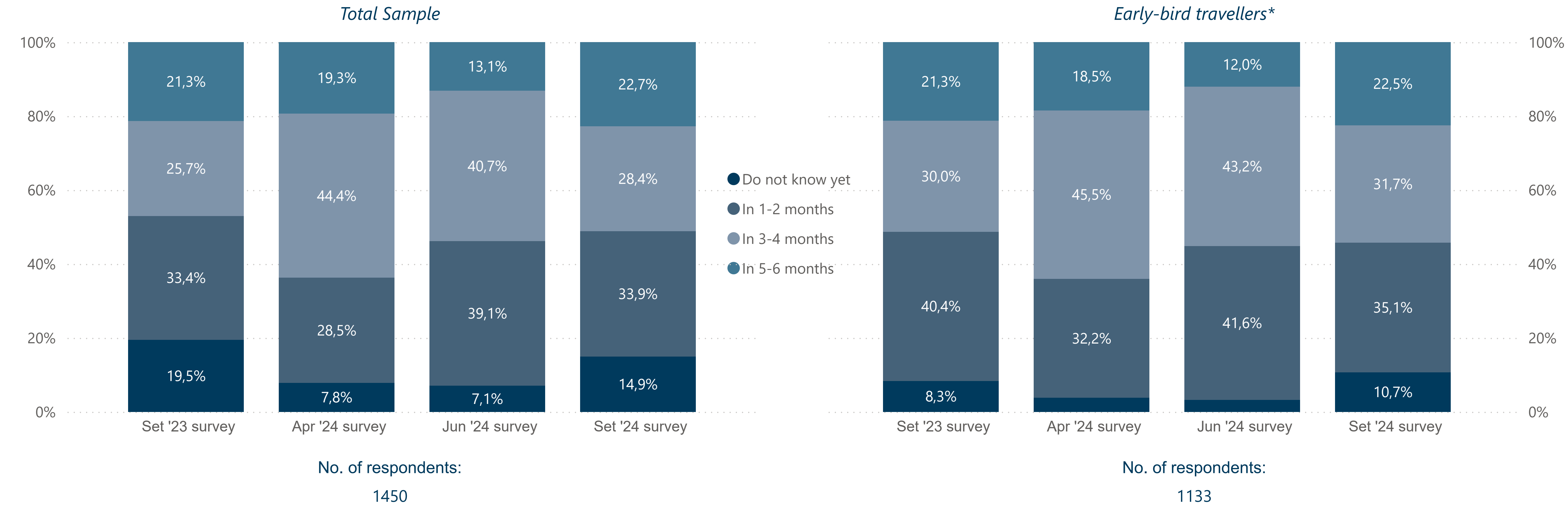
Respondents most likely to travel in the next 6 months, by type of traveller



45,4% of European Travellers have as their main travel preference ta major tourist destination with well-known attractions, while 45% want a destination that's less popular among tourists. Only 9,6% want to go somewhere remote or "off-the-beaten-path".

Question: Thinking of the next country you intend to visit, in what type of destination, within it, do you plan to spend most of your time?

When will Europeans travel next?

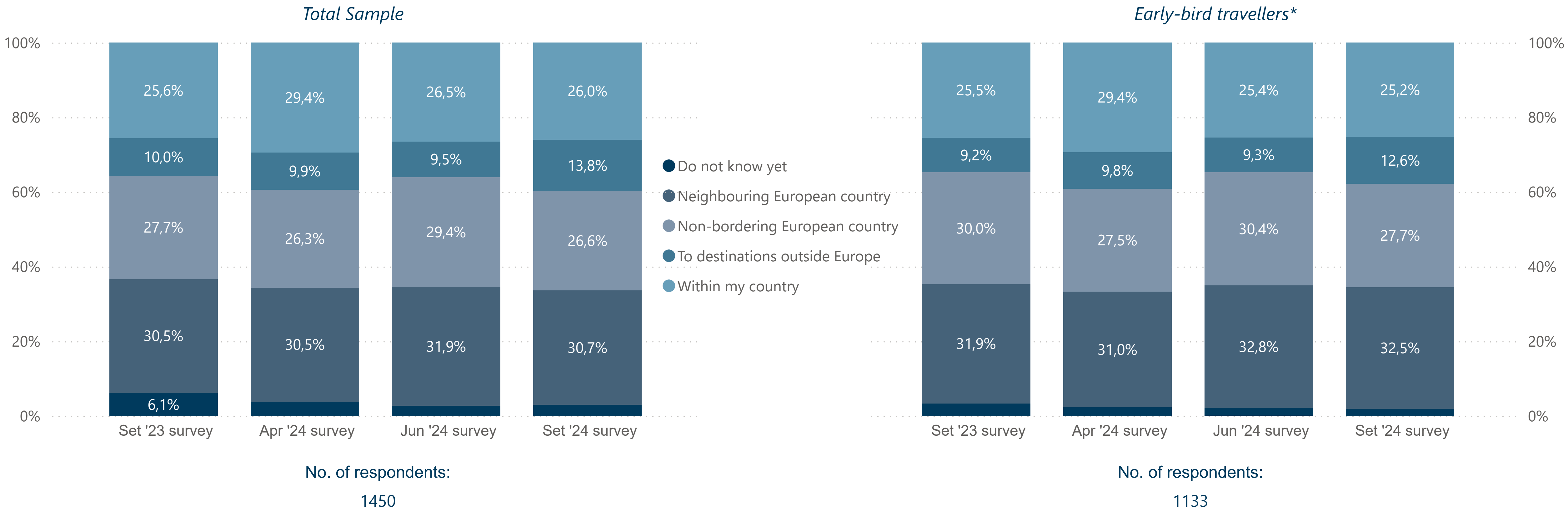


Compared to Set 2023, travellers seems to be more certain of when they will travel next with 14,9% answering that they still don't know vs 19,5% last year, but the opposite happens with the early-bird travellers. (10,7% Set'24 vs 8,3% Set'23)

***Early bird travellers** refers to respondents with short-term travel plans/ most likely to travel in the next 6 months

Question: When are you most likely to go on your next trip either in your country or within Europe?

Where will Europeans travel within the next 6 months?

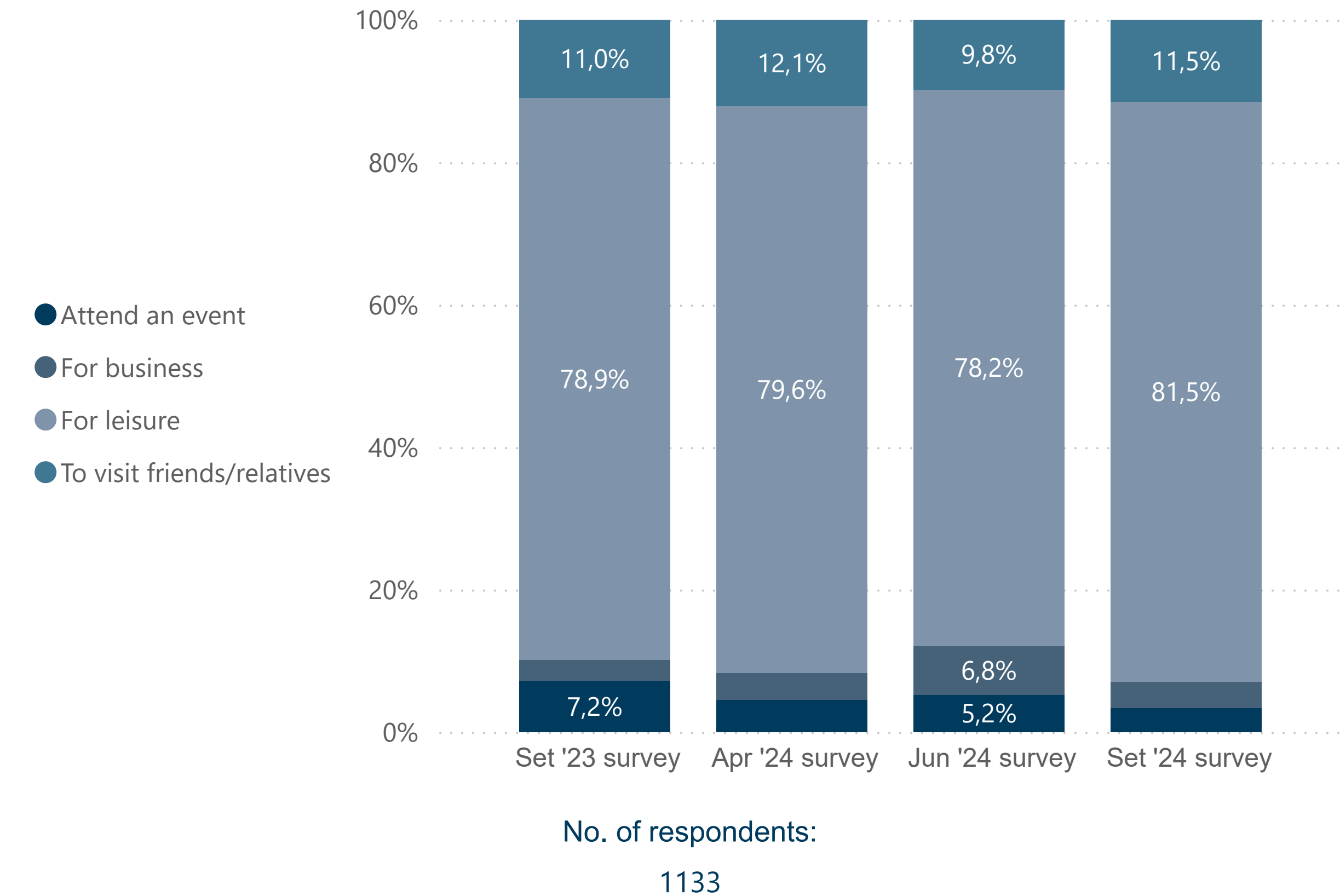


International travel within Europe remains respondents leading choice, a trend equally strong among "early-bird" travelers. Is also noteworthy that travelling outside of Europe is on this highest value with 13,8% planning to travel outside Europe.

*Early bird travelers refers to respondents with short-term travel plans/ most likely to travel in the next 6 months

Question: When are you most likely to go on your next trip either in your country or within Europe?

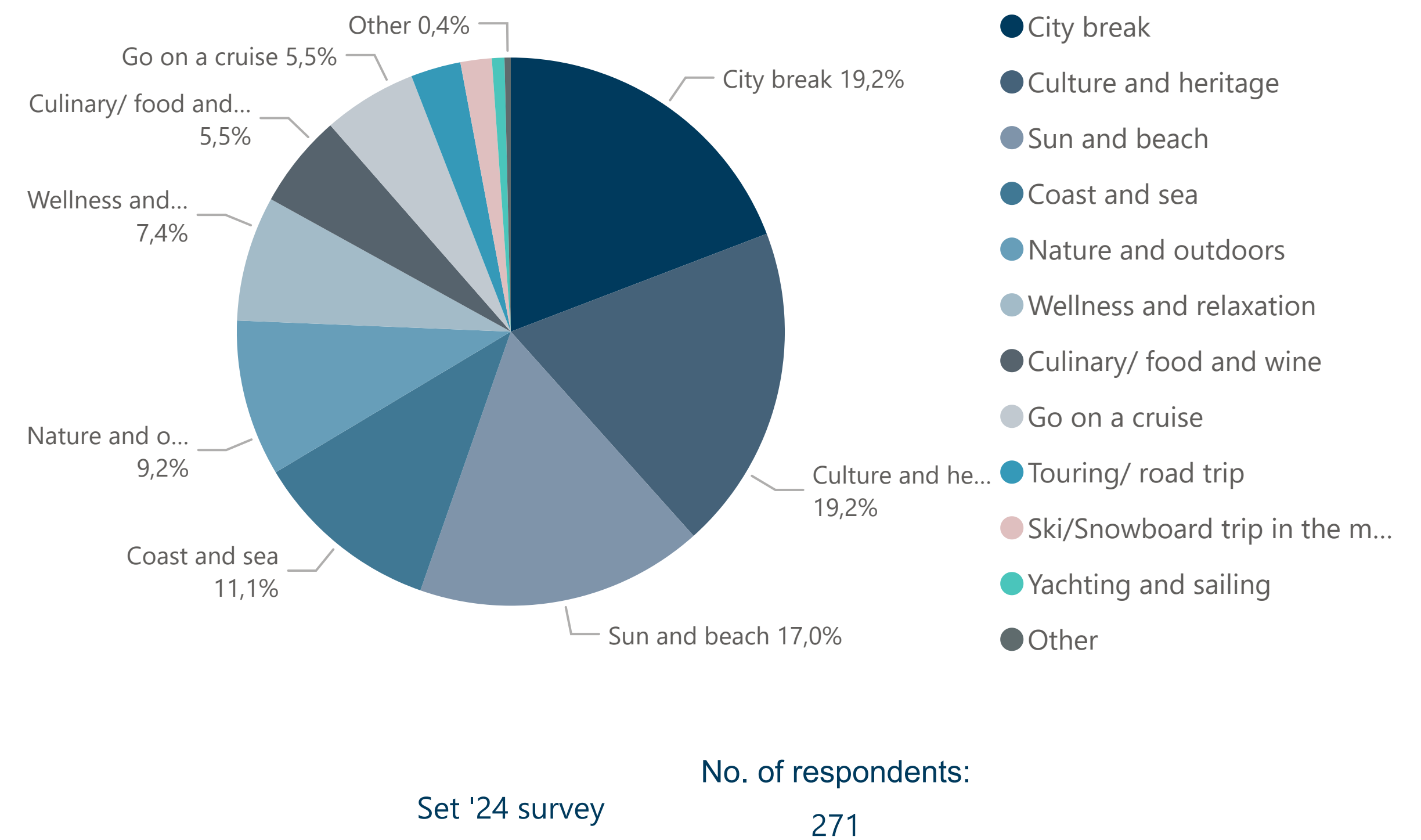
Purpose of travel for respondents most likely to travel in the next 6 months



Leisure is by far the main motivation to travel throughout the year (a trend continually sustained throughout the different waves), followed by visits to friends or relatives.

Question: For what reason are you most likely to travel within Europe next?

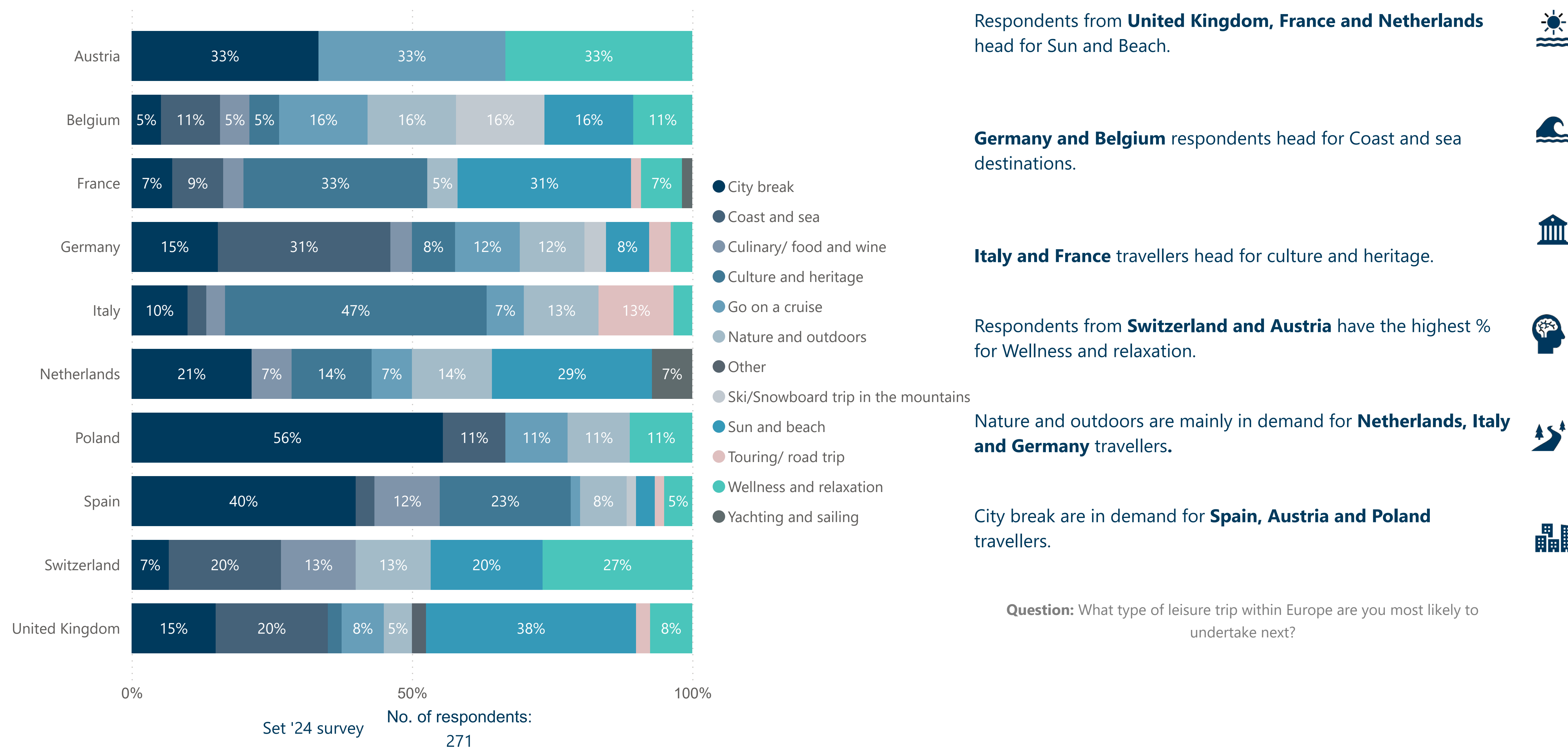
Preferred type of leisure trip for respondents most likely to travel in the next 6 months



28,1% of Europeans that are willing to travel to Portugal in the next 6 months will do it for sun and beach (24,4%) or the coast and sea (14,3%) motives. Culture and Heritage (19,2%) and City Break (19,2%) are the other top motives.

Question: What type of leisure trip within Europe are you most likely to undertake next?

Preferred type of leisure trip for respondents most likely to travel in the next 6 months, by country



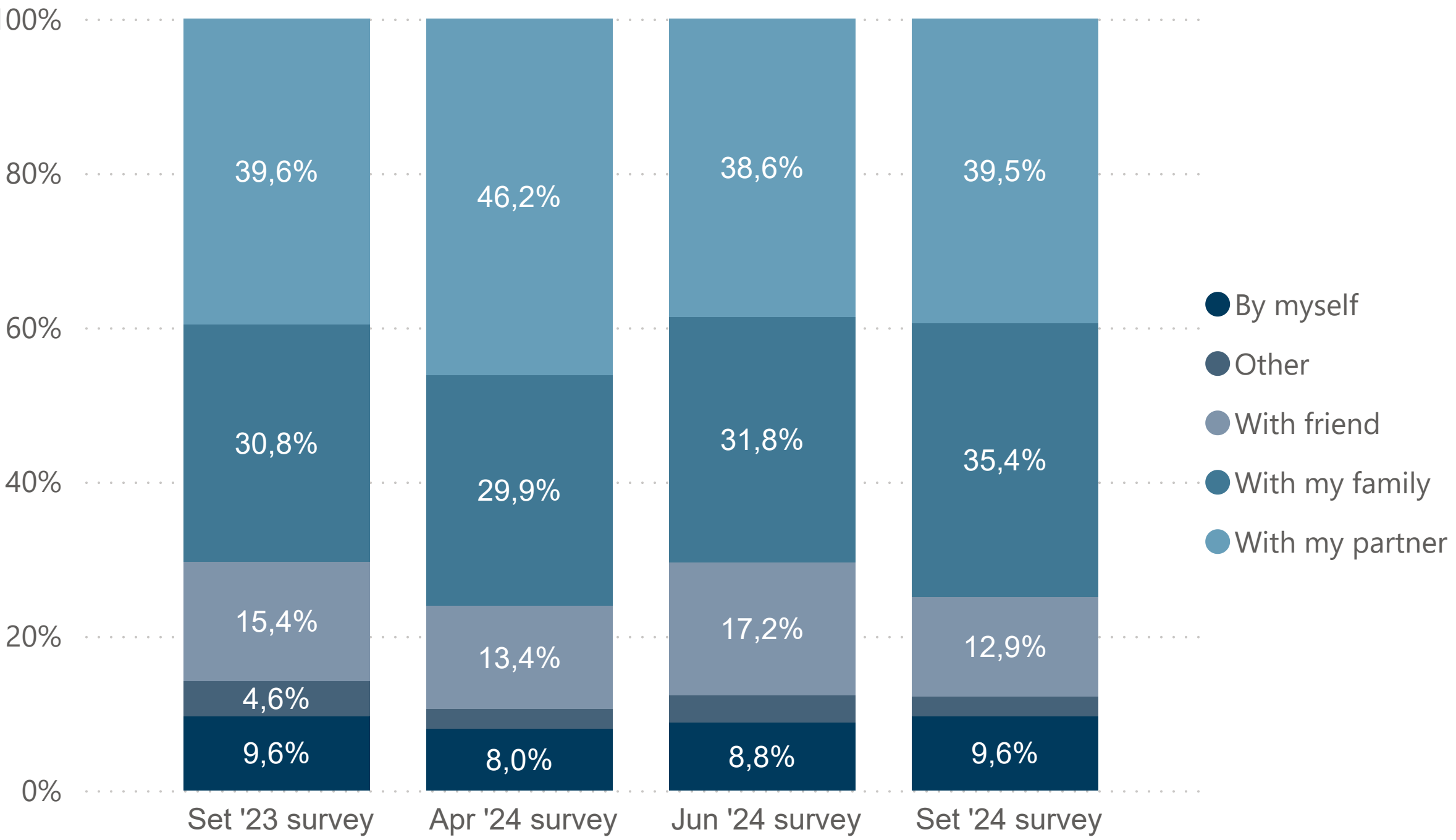
02 TRAVEL PLANNING



ETC Monitoring Sentiment For Domestic and Intra-European Travel

Respondents that plan to travel to Portugal next

Preferred travel companion for respondents who are most likely to travel in the next 6 months



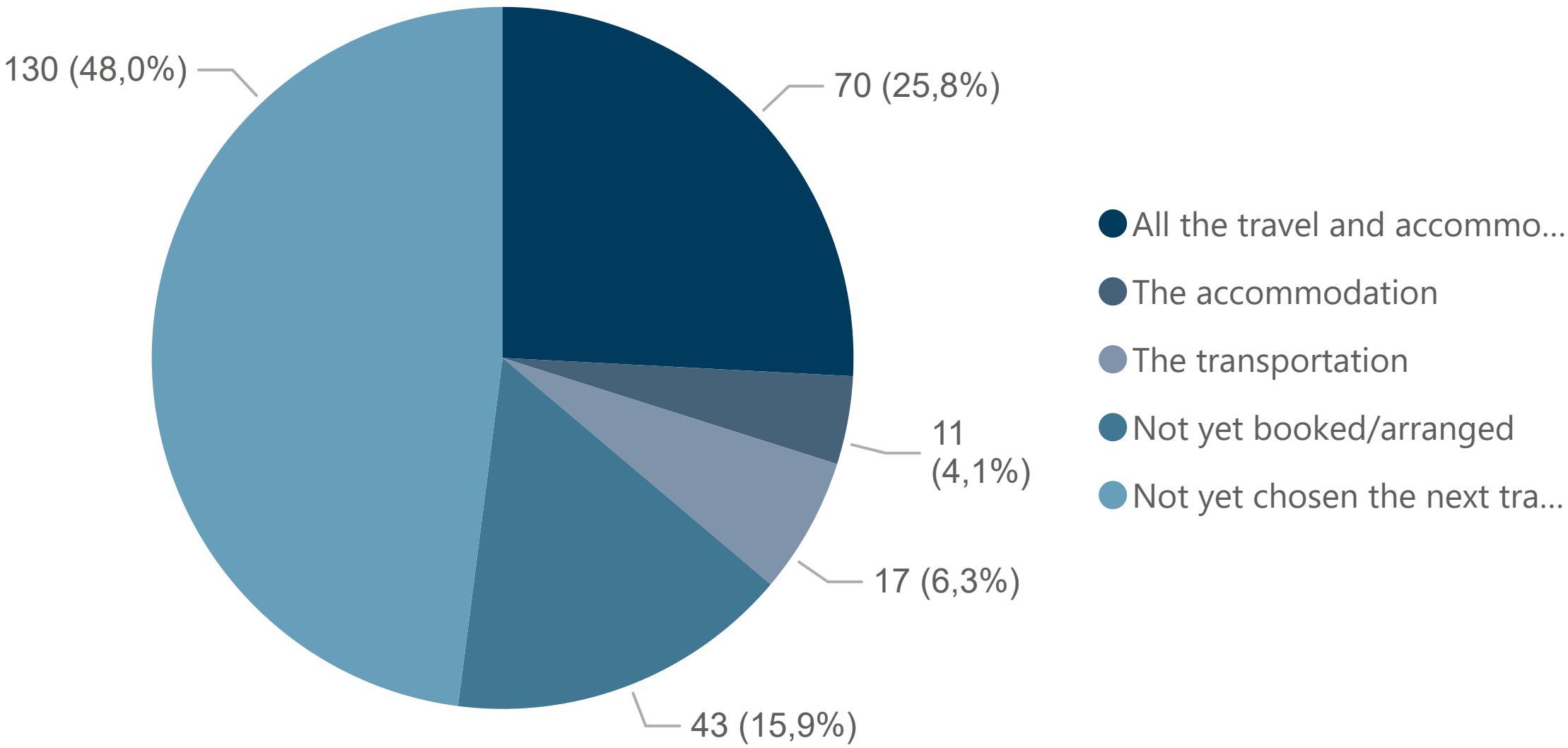
No. of respondents:
1133

The main preference for travelling continue to be travelling with the partner followed by travelling with the family. Comparing with the Set'23 wave, there was a increase in the intention of travelling with the family,



Question: With whom are you most likely to travel during your next trip within Europe?

Status of planning for the next trip



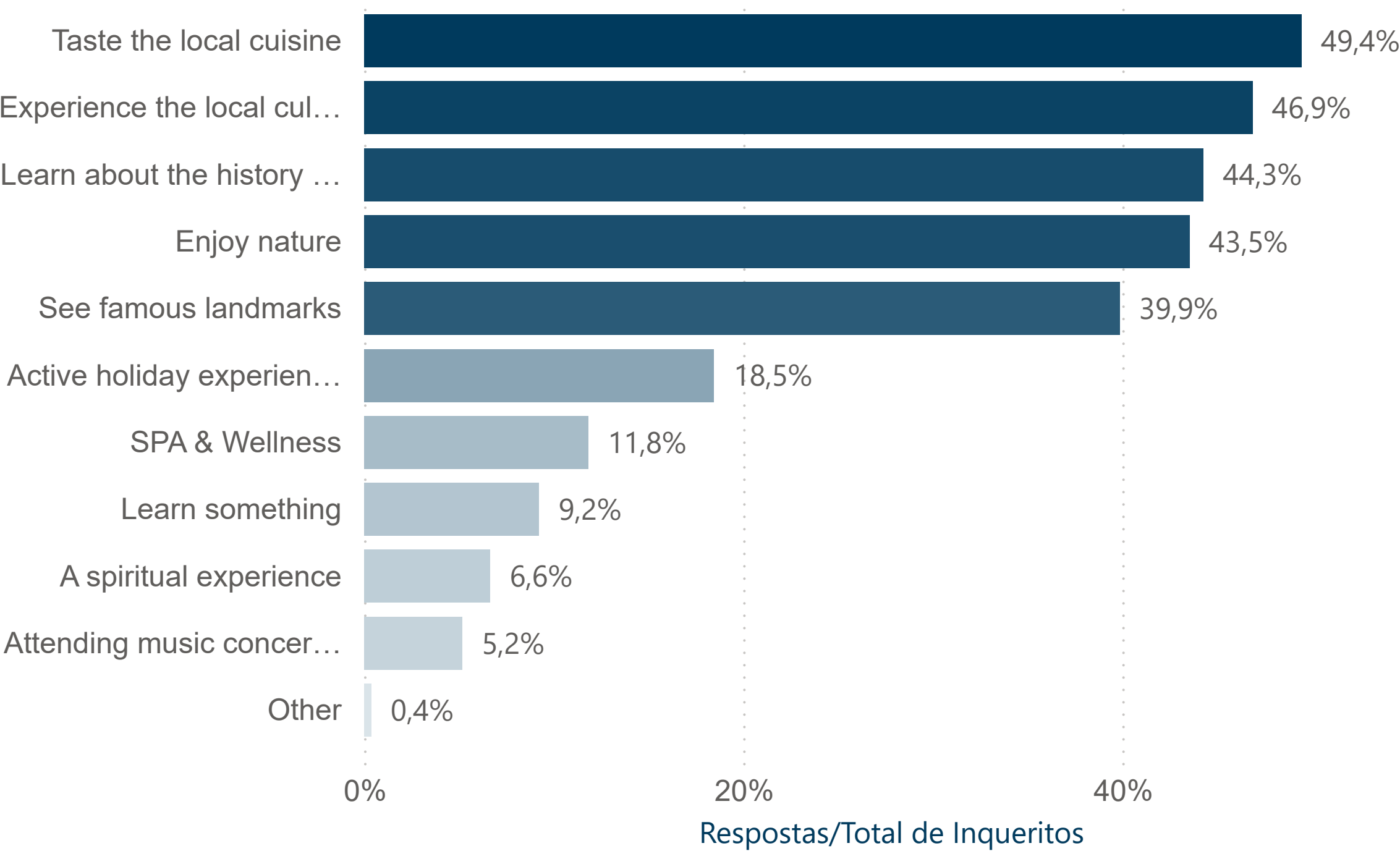
No. of respondents:
271

48% of the respondents haven't yet chosen the next travel while 25,8% have already planned all the travel and accommodation.

Question: Please select a response which best describes the planning for your next trip



Travel experiences that europeans look for

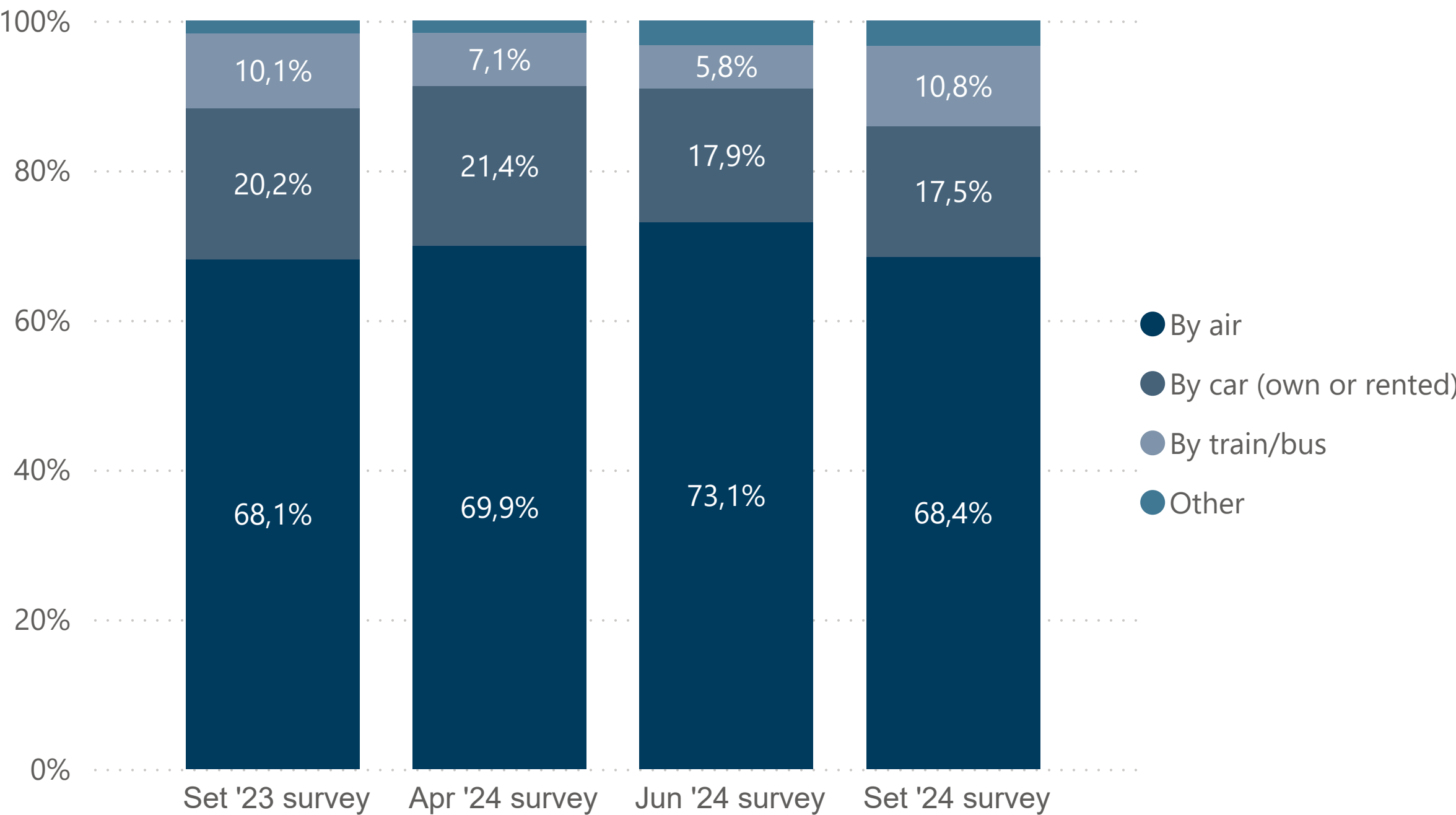


No. of respondents:
Set '24 survey
271

The top 3 travelers experiences that Europeans look for when travelling to Portugal are: taste the local cuisine, experience the local culture and learn about the history and cultural heritage.

Question: Which of the following travel experiences will you look for during your next trip in Europe? (select 3)

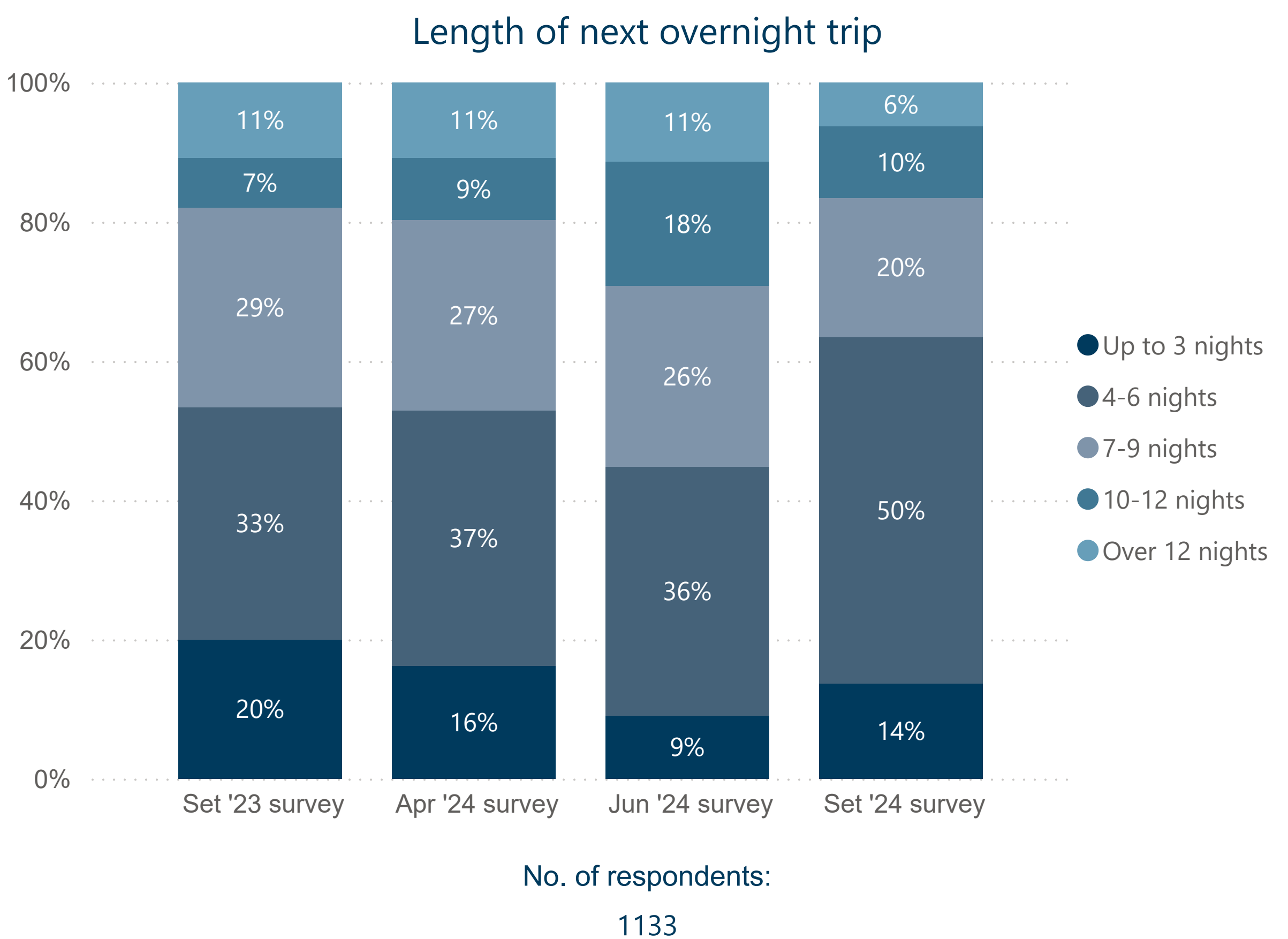
Top 4 modes of transport for respondents most likely to travel in the next 6 months



No. of respondents:
1133

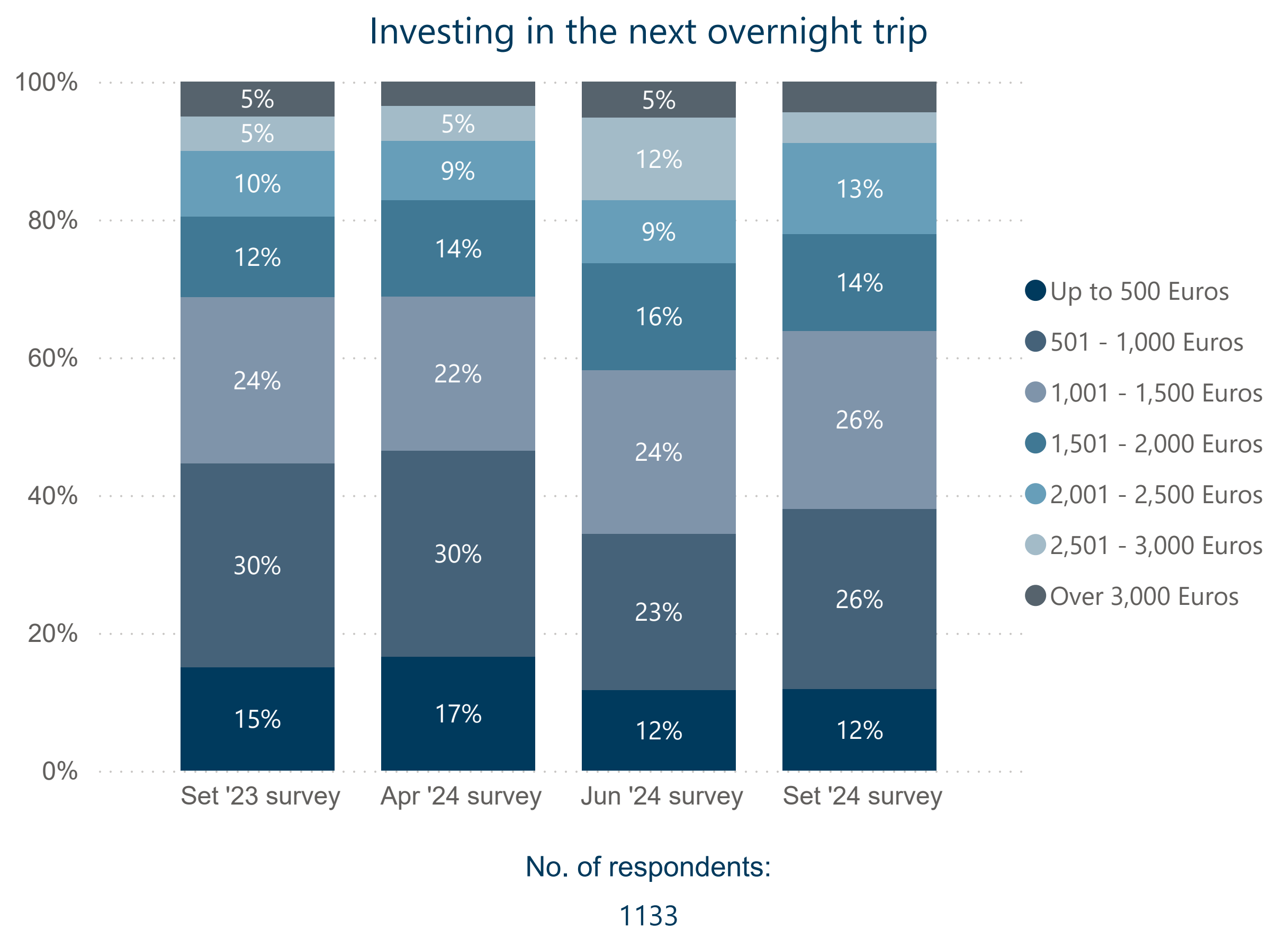
Air travel remains from afar the preferred means of transport of respondents that plan to travel to Portugal in the next 6 months.

Question: Which of the following modes of transport would you most consider using during your next trip within Europe?



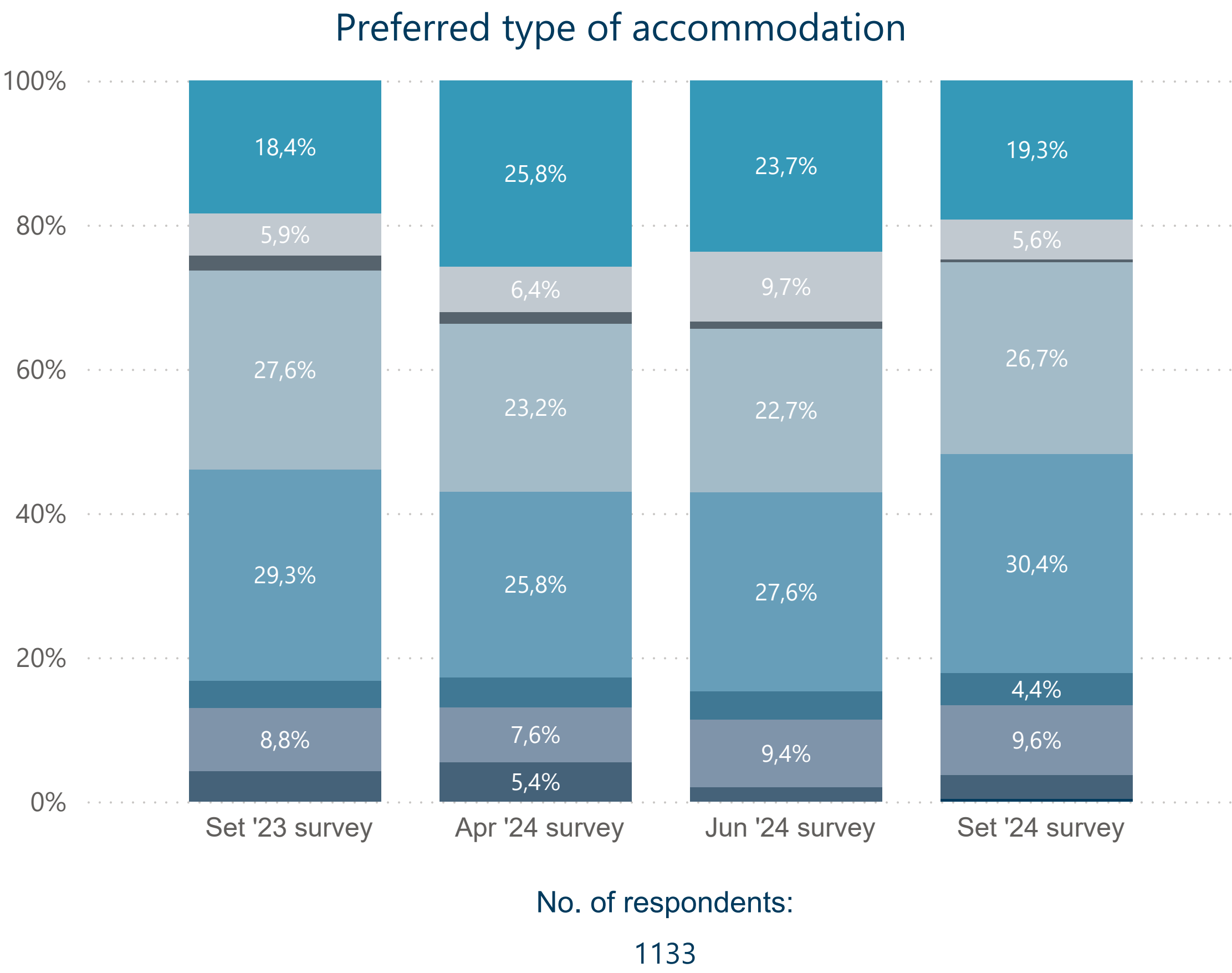
Travelers continue to prefer staying mainly 4-6 nights in Portugal, preference followed by the 7-9 overnight stays.

Question: What would be the length of your next overnight trip?

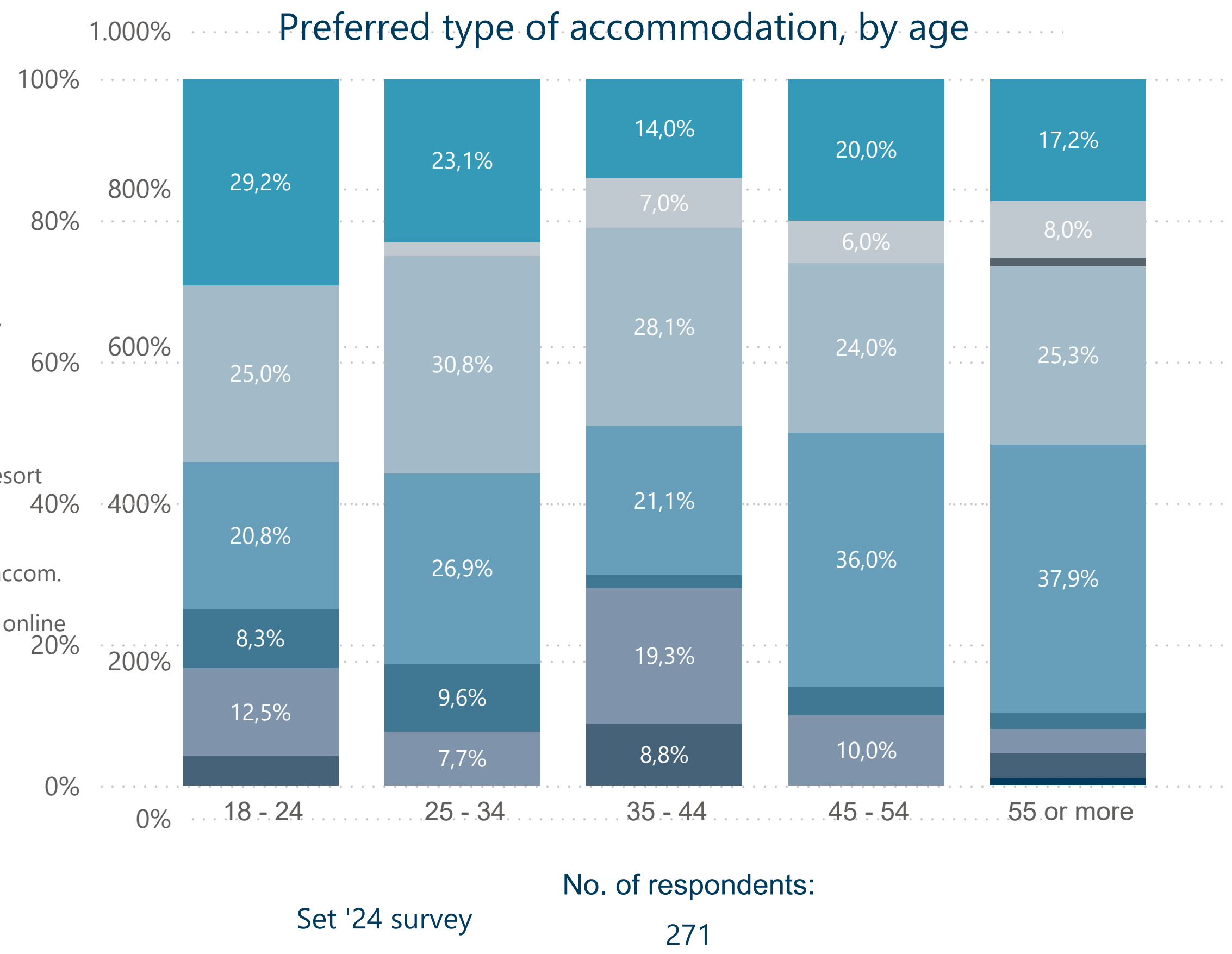


Travelers planning to travel to Portugal intend to spend around 1001€ - 1500€ per person (including accommodation, transportation and travel activities), have the same weight (26%) that those planning to spend on the range of 501€-1000€.

Question: How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?



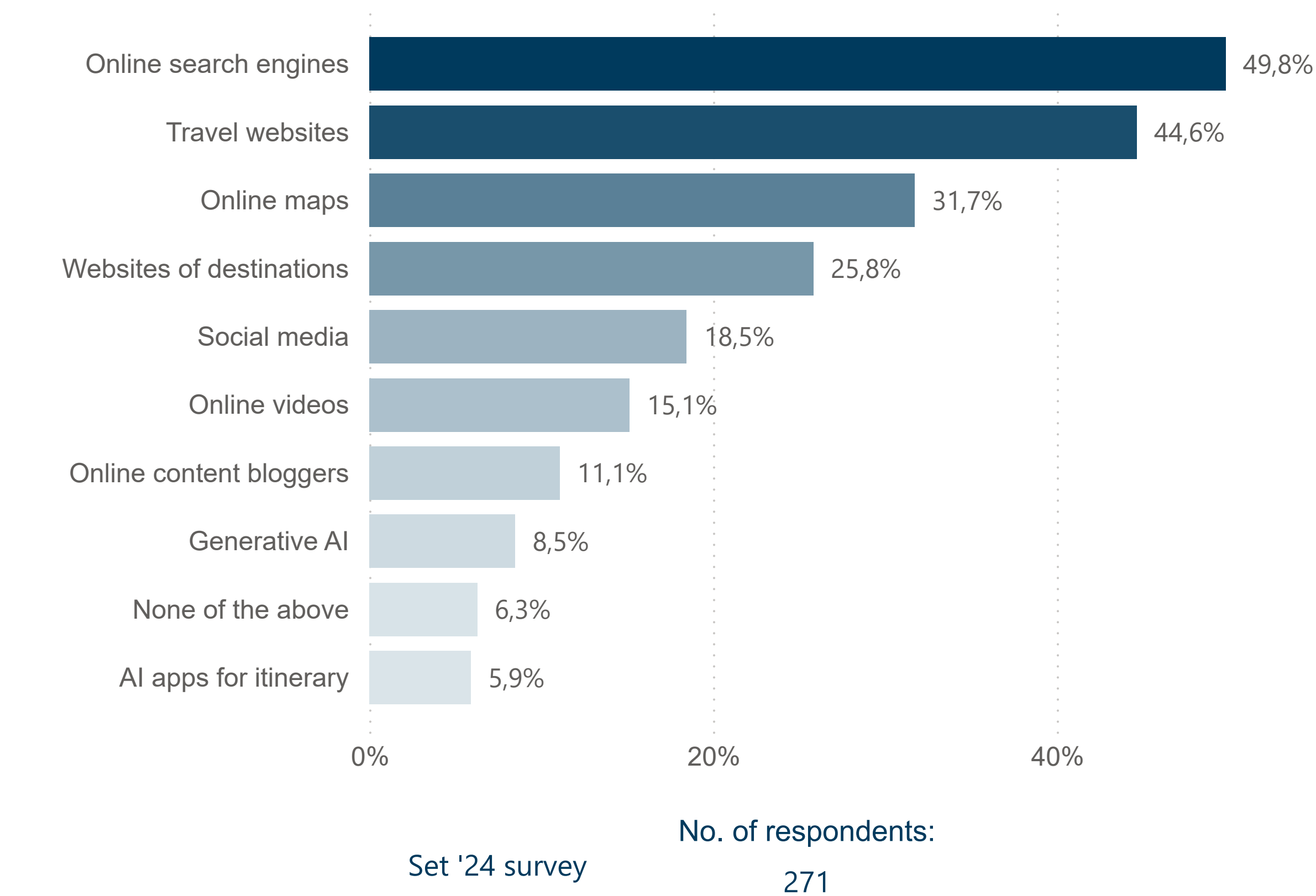
The preferred type of accommodation for Europeans travelers are Hotel chain or resort (30,4%), Independent Hotel/resort (26,7%) and Short-term rental via online (19,3%).



On the groups of 18-24 there is a preference for staying in a short-term rental via online while the other age groups prefer hotel/resort (either independent or a chain).

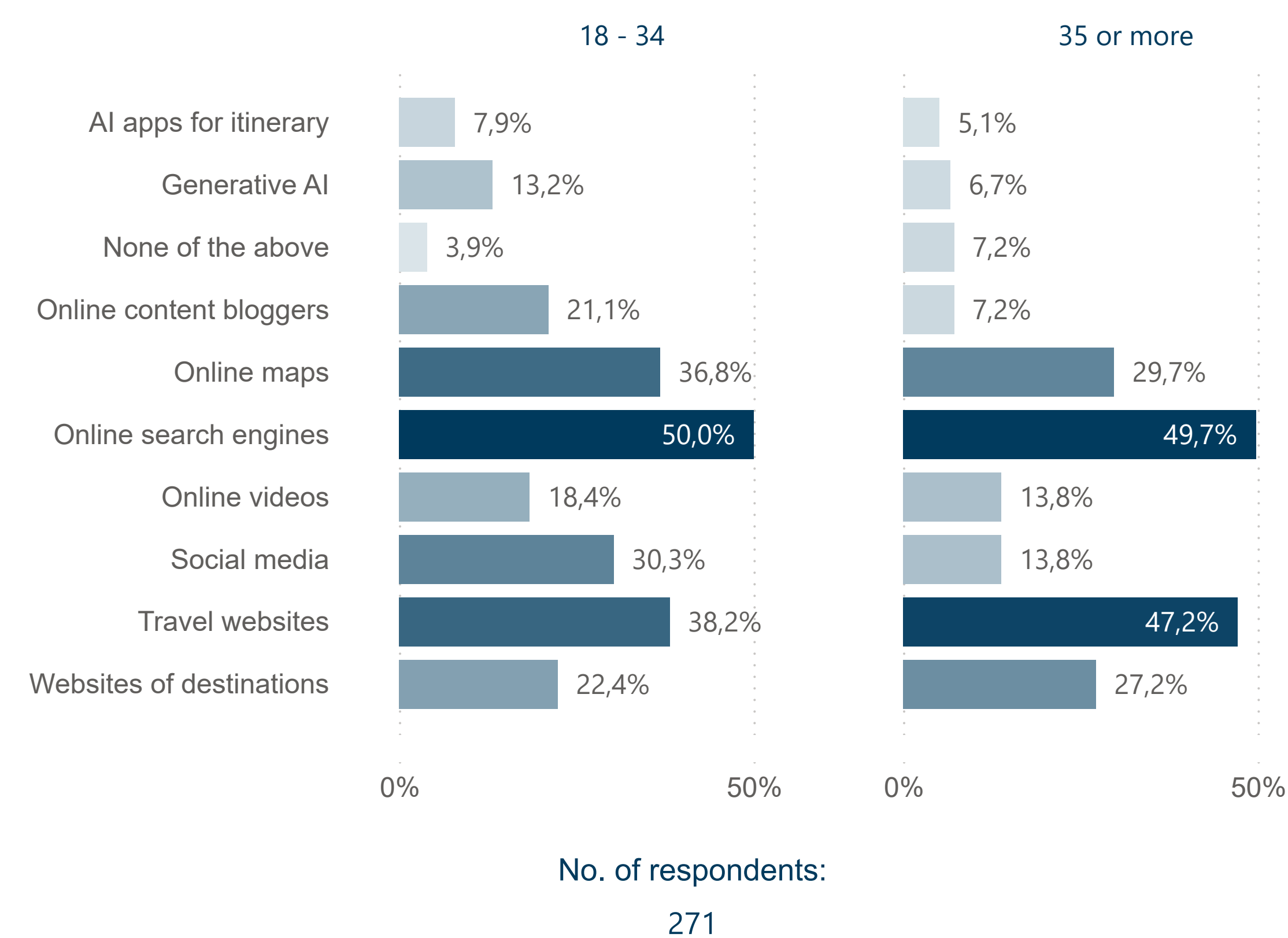
Question: Which of the following types of accommodation would you most consider staying at during your next trip within Europe?

Travel experiences that europeans look for



Of the digital tools used by travelers, 49,8% use online search engines, while 44,6% use travel websites as their main tool for plan their trip within Europe.

Travel experiences that europeans look for



Comparing by age groups, those with less than 35 years tend to use more Social media and Online content bloggers, while those with more then 35 tend to use more Travel websites or the Websites of destination.

Question: Which digital tools have you used (or will use) to plan your trip within Europe in the next 6 months?

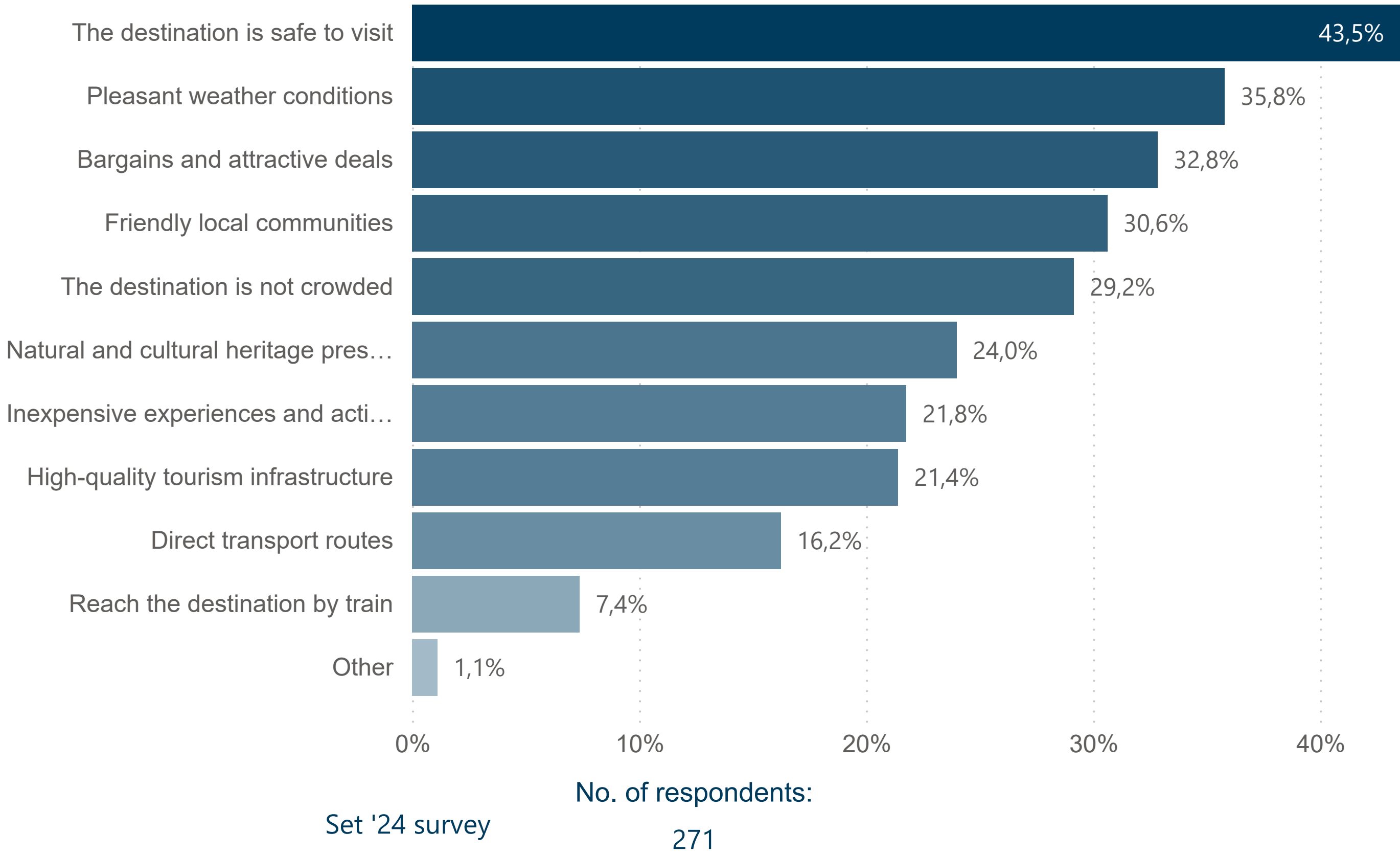
03 TRAVEL CONCERNS



ETC Monitoring Sentiment For Domestic and Intra-European Travel

Respondents that plan to travel to Portugal next

Criteria considered to play the most important role in choosing the respondents next holiday destination



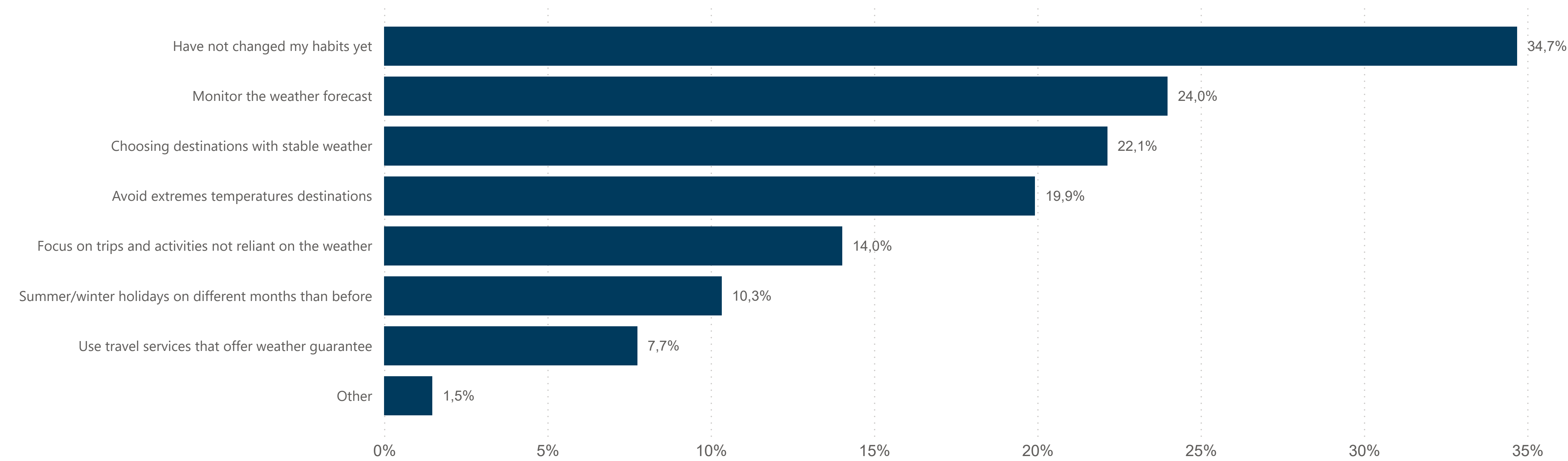
Destination safety was the most selected one in this wave, being consider the most important criteria by more than half of the travelers.

Having **pleasant weather conditions** or getting **bargains and attractive deals** were the other on the top 3 criteria, with 35,7% and 32,8% respectively.

The preference for the remaining criteria is somewhat scattered.

Question: What criteria will play the most important role in choosing your next holiday destination? (up to 3 answers)

How has the changing climate been influencing your travel habits?



No. of respondents:
Set '24 survey
271

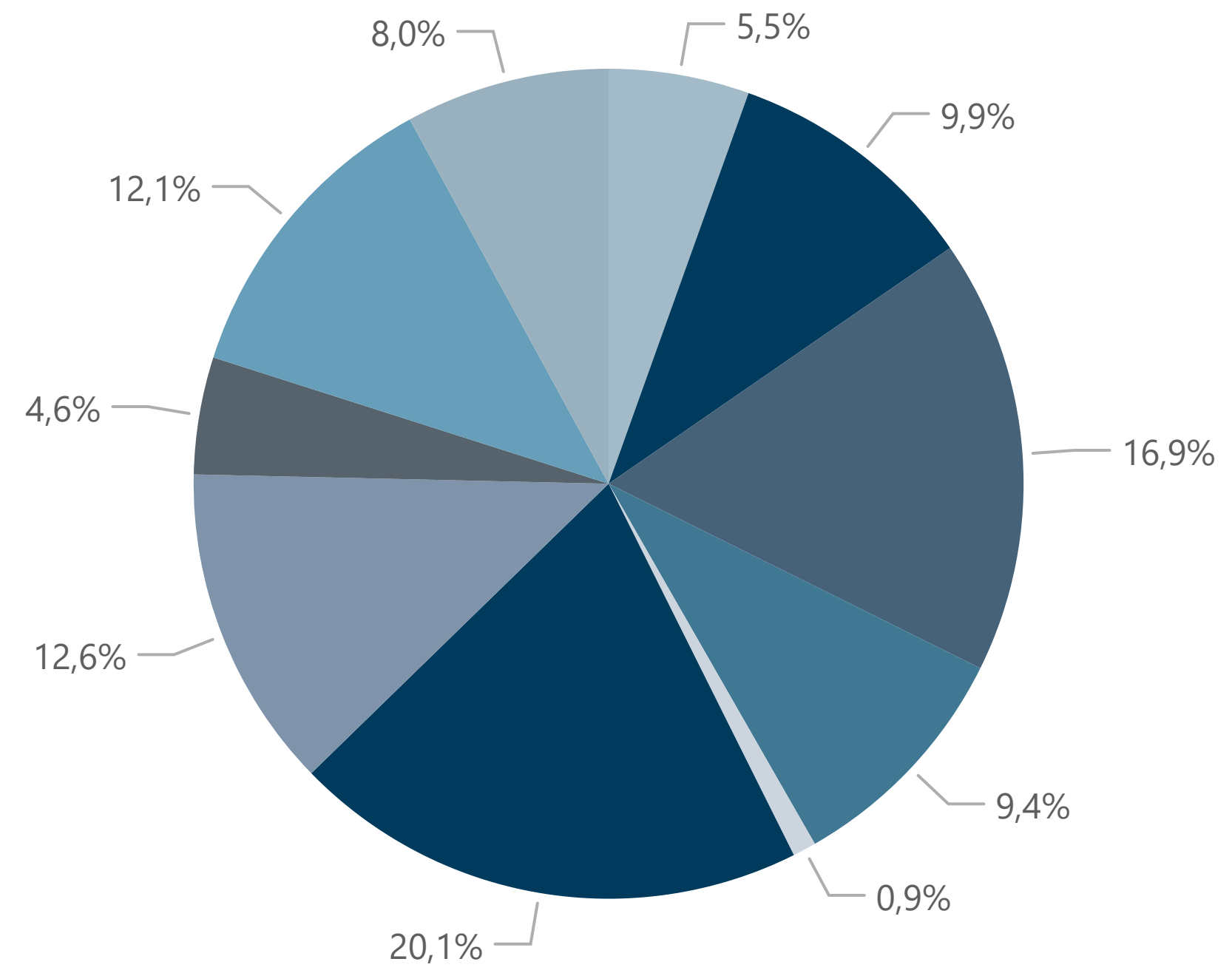
Around a third of the travelers have not changed their habits yet, with those that have made changes focusing in choosing destinations with stable weather, avoiding destinations with extremes temperatures and monitoring the weather forecast.

Question: How has the changing climate (heavy rains, heatwaves, wildfires, lack of snow, etc.) been influencing your travel habits? (multiple choice: up to 2 answers)

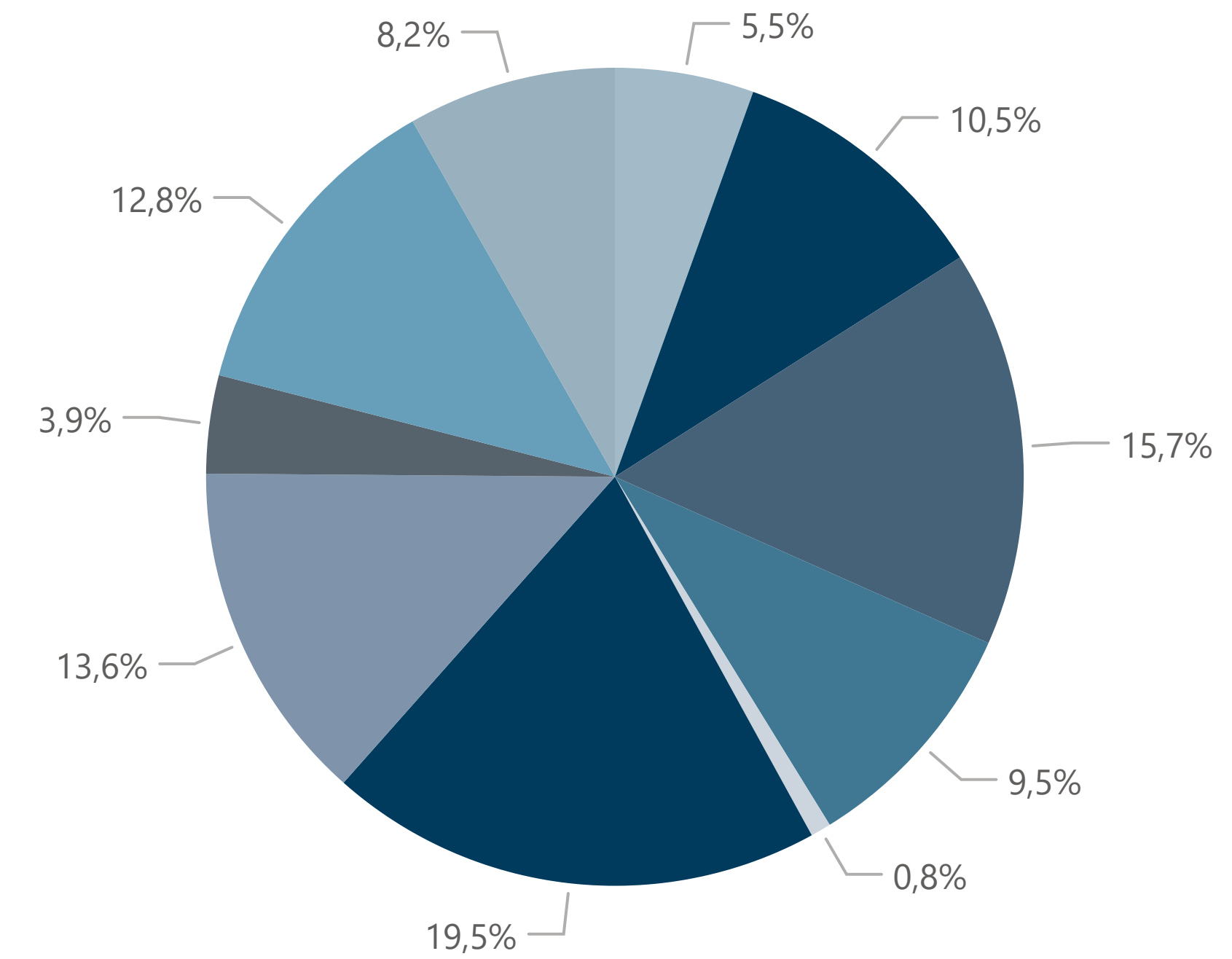
TRAVEL CONCERNS



Leading concerns
*Total sample vs. early-bird travellers**



No. of respondents:
348



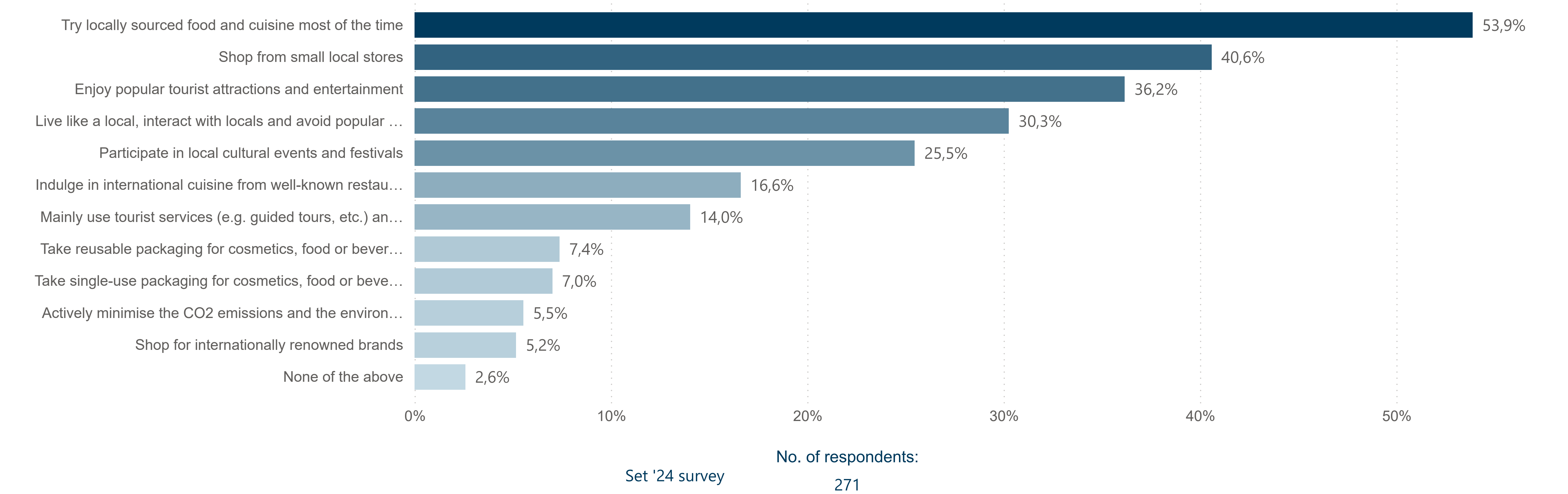
No. of respondents:
271

Rising costs due to inflation is now the main concern of Europeans when travelling follow by economic situation and finances and the ongoing conflict on Ukraine

The respondents that want to travel within the next 6 months have numerous concerns. The main ones are the rise of costs due to inflation, economic situation and finances, and the ongoing conflict in Ukraine.

Question: What currently concerns you the most about travelling within Europe?

Respondents’ sentiment towards the rising of travel costs and inflation before the trip



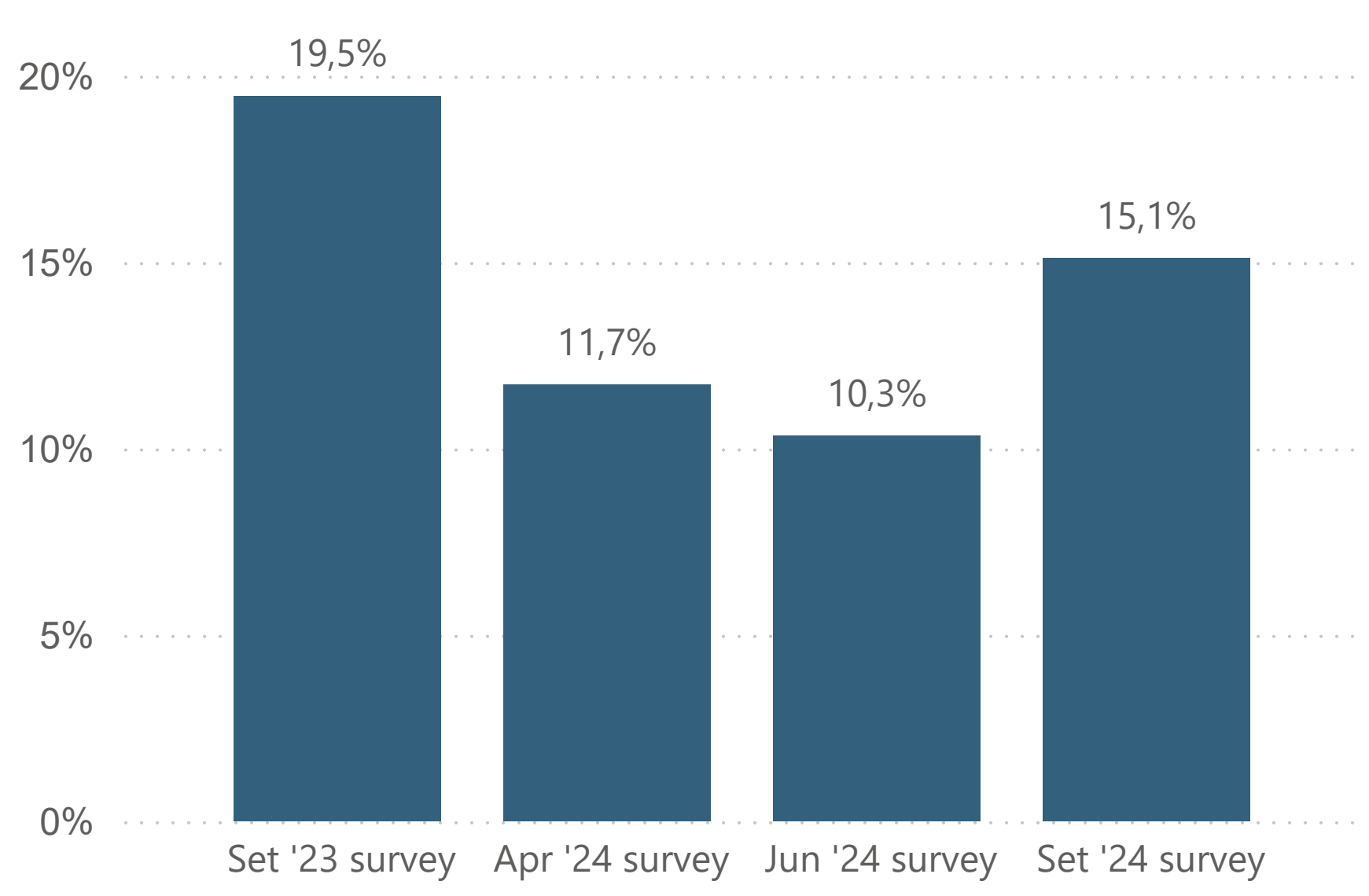
53,9% of the respondents plane to try locally sourced food and cuisine most of the time, during their next trip to Europe, while 40.6% want to shop from small local stores and 36,2% plan to enjoy popular tourist attractions and entertainment

Question: Which of the following actions are you most likely to take during your next trip to Europe?

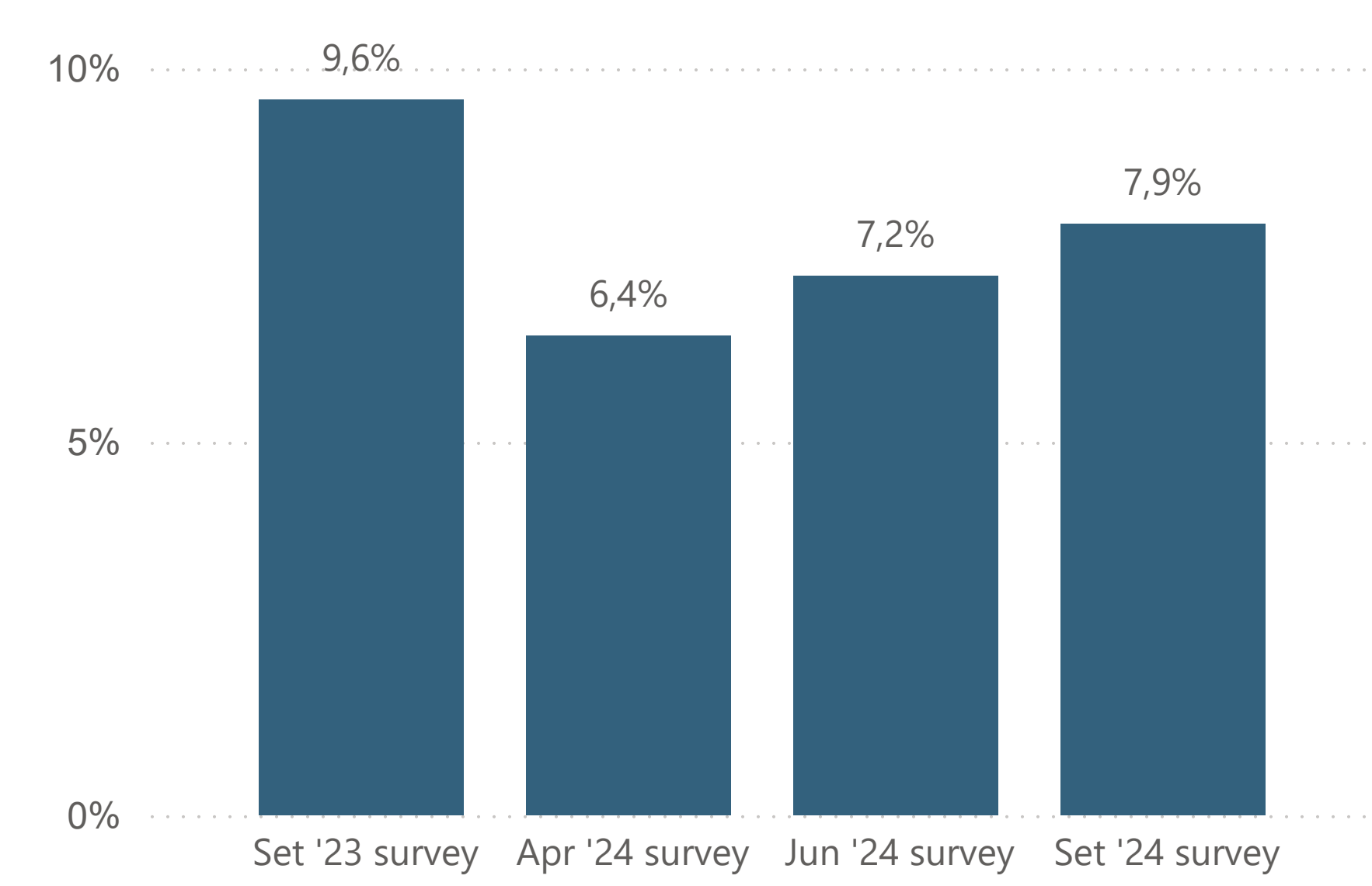
TRAVEL CONCERNS



% of respondents that do not know when they will travel next



% of respondents that do not know when they will travel next



THE LEVEL OF UNCERTAINTY FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

15,1% of respondents state that **they do not know when they will travel next**



20,4% of respondents **haven't yet planed anything** including where they will travel next.



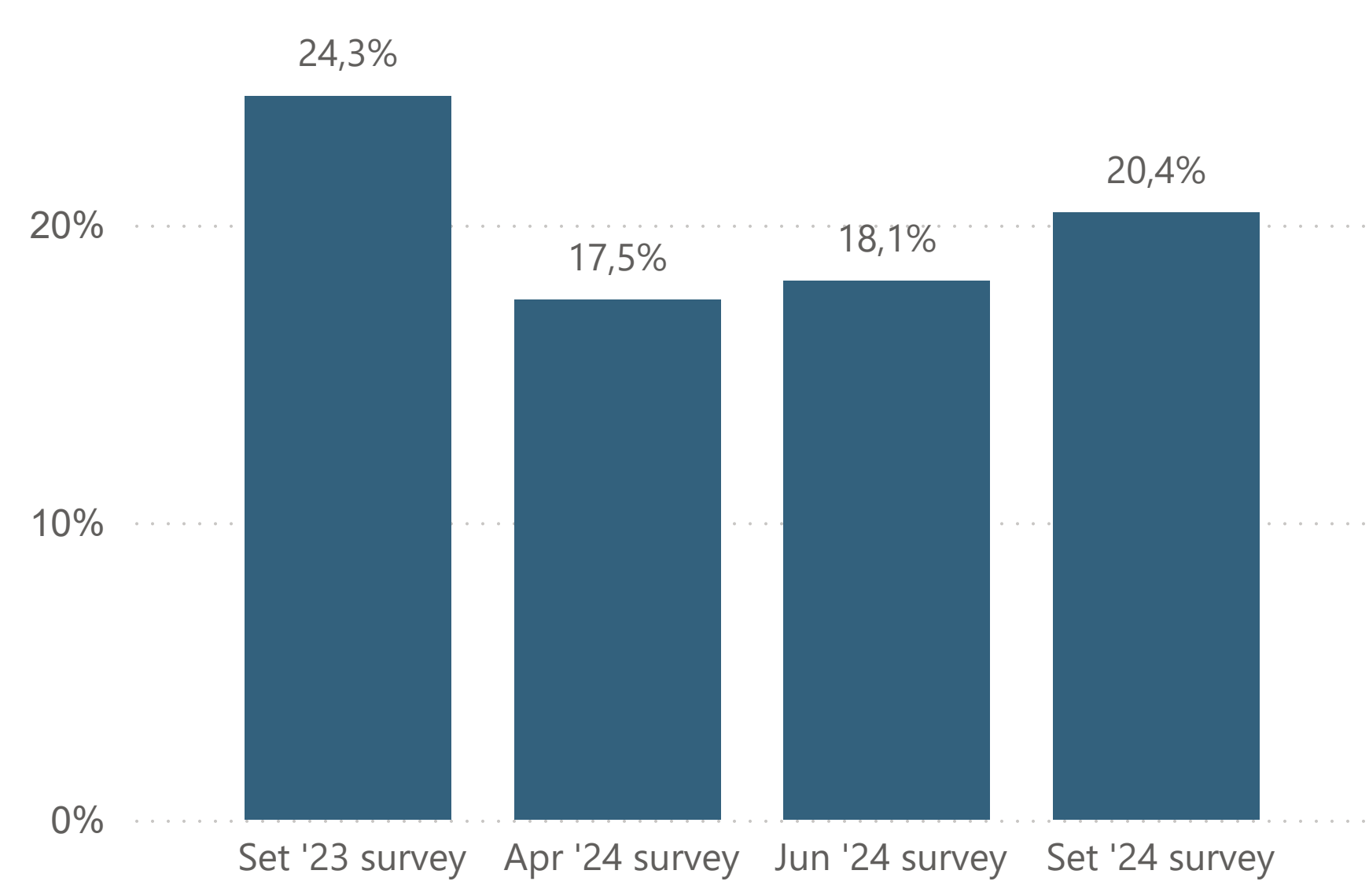
7,9% of respondents state that **they do not know where they intend to travel** to in the next 6 months



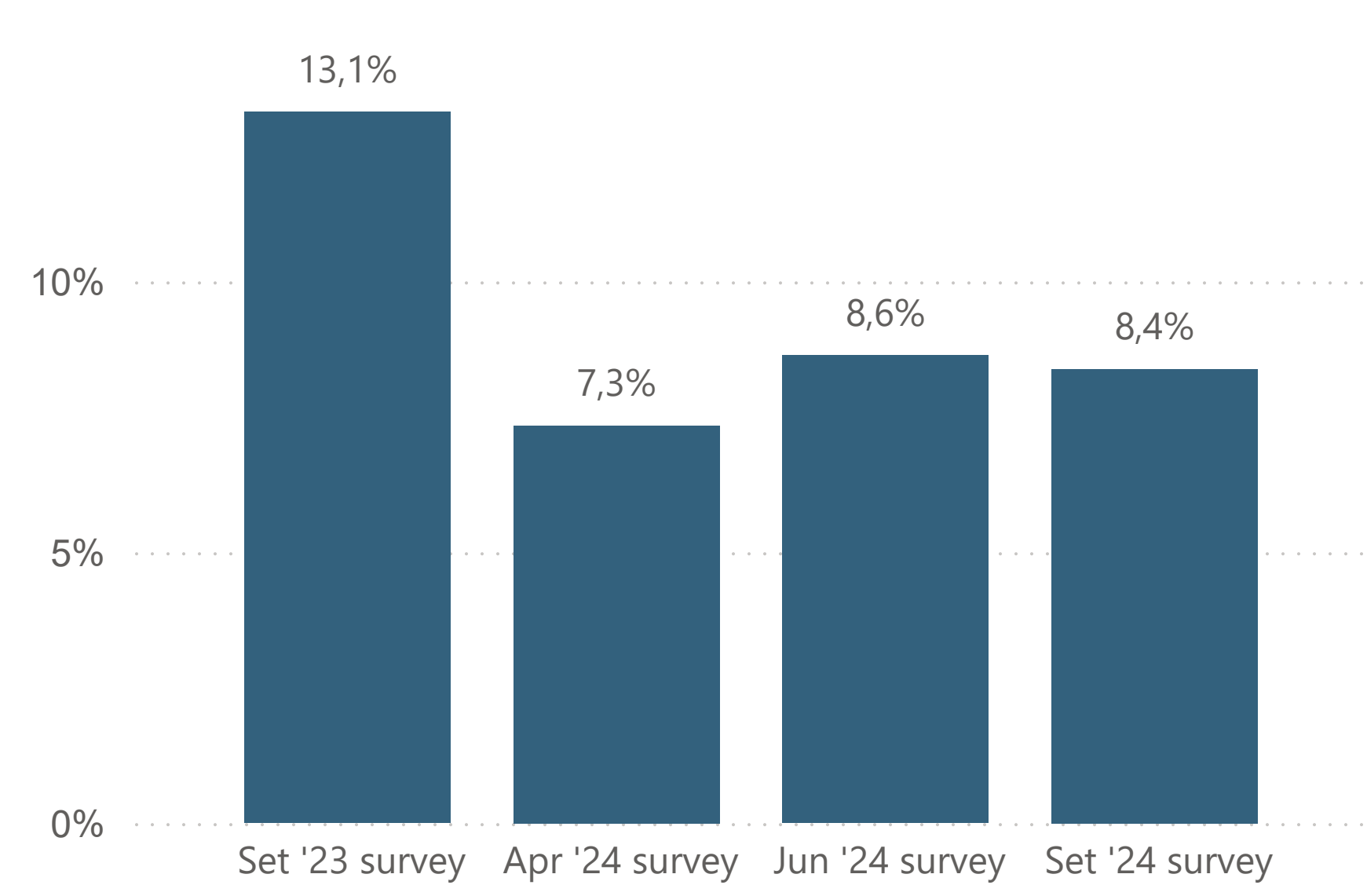
8,4% of respondents **don't know how many trips** they will take in the next 6 months within Europe

No. of respondents (Total):
23.808

% of respondents that haven't planned anything



% of respondents don't know how many trips will take



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Credits

Owner: © Turismo de Portugal, I.P.

Author: Knowledge Management
Business Intelligence

Source: European Travel Commission (ETC)



Information Classification: External Use

Report Date: September 2024